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ABSTRACT

This handbook consists of guidelines and materials for use in the development, implementation, and administration of marketing and cooperative education programs in Missouri. The following topics are among those covered: nature and scope of Missouri's marketing education program; role of marketing education teachers; program development (determining student and occupational needs); instructional program (curriculum development, student assessment, instructional delivery); cooperative education (training stations, sponsors, and agreements; instructional management plans; coordination visits; evaluations); Distributive Education Clubs of American (DECA) (professional, civic, service, social, and financial activities); advisory committees; facilities, equipment, and resources; program evaluation (Missouri School Improvement Program) (MSIP), local program evaluation (yearly), mastery of course competencies; legal aspects (equal access, hazardous occupations, sexual harassment, labor legislation, targeted job tax credits [TJTC]); and professionalism (service, acquisition of knowledge, professional organizations). Appendixes constituting approximately 60% of the handbook include the following: generic mission statement; Missouri certification standards for secondary- and postsecondary-level marketing education teachers and coordinators; miscellaneous forms and form letters; lists of core competencies for various subject areas; policies for cooperative vocational education programs; sample generic training agreements; and student and employer follow-up questionnaires. (MN)

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Marketing Education Administrative Handbook

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MARKETING AND COOPERATIVE EDUCATION ADMINISTRATIVE HANDBOOK

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SECTION 1

MARKETING EDUCATION PROGRAM OVERVIEW

The mission of marketing education is to develop competent workers in and for the major occupational areas within marketing, to assist in the improvement of marketing techniques, and to build understanding of the wide range of social and economic responsibilities which accompany the right to engage in marketing businesses within a free enterprise system. This mission statement was developed and validated in conjunction with the 1984 National Curriculum conference sponsored by the Marketing Education Resource Center. A generic mission statement for your local marketing education program can be found in Appendix 1A.

Essential to the implementation of the mission are six fundamental premises:

1. The discipline of marketing is the content base for all instruction.
2. Instruction will be offered to all persons and in whatever settings necessary to meet community needs.
3. Programs will deliver a range of instruction covering functional skills, career competency development, and operational management.
4. Instruction will stress application to and direct involvement with marketing businesses and be carried out by a variety of methods.
5. Professional personnel in the field of marketing education will have training in marketing education and possess business experience in marketing.
6. Where offered, marketing education will be considered an integral part of the institution's education program, with direction and counsel coming largely from a business community advisory group.[1]

Marketing education programs serve a cross section of the school population. Students who seek postsecondary education in a two-year or four-year institution will benefit from the program, as well as students who enter the work force upon high school graduation. Postsecondary marketing education programs are offered for individuals who wish to pursue education in preparation for entering or for advancement in marketing careers. In addition, these programs are offered for individuals who wish to pursue part-time study in preparation for marketing careers, and for those individuals who wish to make a better contribution to business and society.

The marketing education program consists of three major components: classroom instruction, cooperative education, and DECA. The classroom instruction focuses on the core curriculum which includes: communications in marketing, economic concepts, employment and advancement, human relations in marketing, marketing operations, market planning, advertising and sales promotion, selling, and marketing concepts. Within this core the marketing functions of financing, risk management, selling, promotion, pricing, purchasing, marketing information management, product and service planning, and distribution are included as part of the curriculum.

The Mission statement and six premise statements are used with permission from the MarkEd Resource Center, Inc., Columbus, Ohio.

The second component is cooperative education, which is optional. The internship is structured to integrate the marketing education curriculum in the context of real life experiences. Students obtain employment in a marketing related occupation and are supervised by the teacher. The business must be approved by the school and contribute directly to the development of the competencies that are part of the marketing education program, and essential for employment and advancement in the field of marketing. Students are employed in a business that conforms to federal, state, and local laws and regulations. Further information regarding operational guidelines for cooperative education programs can be found in this handbook in the section entitled Cooperative Education (refer to Section 5).

The third component, DECA, is an association for students enrolled in the Marketing and Cooperative Education instructional program. It is an integral part of the program to provide opportunities for personal and professional development. DECA is a method of instruction that reinforces what the student learns in the classroom through co-curricular activities. Students who participate in a well-planned program of DECA activities are more likely to be motivated toward successfully participating in the business arena and develop self-confidence they need to set and achieve goals. The local DECA chapter is the showcase for student achievement and serves as the public relations agent for the Marketing and Cooperative Education instructional programs. Further information regarding DECA can be found in this handbook in the section entitled Vocational Student Organization (refer to Section 6).

Secondary and postsecondary marketing education programs are developing courses to articulate with each other. Articulation has become an important educational reform effort. Articulation of courses from the secondary to postsecondary level is essential to avoid duplication. Tech Prep provides students with a nonduplicative sequence of courses from the secondary to the postsecondary level. Successful Tech Prep efforts enhance the level of high school academic courses and increase student motivation to learn academic concepts.

Two Tech Prep models are typically developed as part of this concept. The skill enhanced model eliminates duplicate competencies from courses taught at the secondary and postsecondary levels. Students acquire the additional competencies and advanced skills employers are seeking from graduates. The time shortened model serves students in providing dual credit in appropriate vocational courses to fulfill community college associate degree requirements. A student completing marketing education courses at the secondary level could apply credit hours to a marketing associate degree at a community college. Thus, the student is able to complete their marketing education degree program in less credit hours. Further information regarding the marketing education curriculum can be found in this handbook in the section entitled Instructional Program (refer to Section 4).

SECTION 2

MARKETING EDUCATION TEACHER'S ROLE

The marketing education teacher has many responsibilities including tasks related to the following roles: teaching, coordinating, guidance and counseling, public relations, and administration.

The success of the program depends upon how well the teacher performs the tasks associated with these roles, and how well the teacher plans and organizes the work to maintain balance among the various tasks involved. The teacher's effort should be directed toward the primary program goal -- preparing students to enter and advance in careers within the marketing occupational field.

The Marketing Education Teacher's Roles

The Teacher's Role. The primary role of the teacher is teaching. Teaching involves directing an educational program that will permit students to master the attitudes, skills, and knowledge necessary for success in continuing their education and the world of work. In performing the teaching role, the teacher must: (1) teach knowledge, skills and the competencies for performance on the job; (2) help students plan their career and cooperative education experiences; (3) assist students in forming concepts and principles from their learning experiences outside of the classroom; (4) guide students in developing rational-thinking and problem-solving skills; (5) develop research and presentation skills; (6) develop work ethics; (7) advise the local DECA chapter; and (8) prepare students for postsecondary degree programs.

The Coordinator's Role. Coordination involves developing, recruiting and selecting the training station, placing students, and evaluating student's progress on-the-job. The coordination process allows the teacher to facilitate the combination of classroom theory with practical on-the-job applications.

The Guidance and Counseling Role. The teacher is involved with student recruitment, selection, job placement, and career counseling. On-going communications must be maintained with guidance counselors to make them aware of the benefits to students enrolled in the marketing education program.

The Public Relations Role. The teacher must continuously present the program to the public. Therefore, the teacher will attempt to achieve good public relations through practicing positive human relations in daily activities and through publicity of the various program activities. DECA provides an excellent vehicle for public relations and publicity within the school and business community.

The Administrative Role. The extent of the teacher's administrative role varies based on the rules, regulations, and guidelines of the local school district and the Department of Elementary and Secondary Education (DESE). Generally, the teacher will be involved in a wide variety of administrative responsibilities which include planning, budgeting, preparation of annual reports, evaluating, and supervising the marketing education program.

The teacher is the key to a successful marketing education program. The role of the teacher is complex in that it involves the usual competencies of the classroom teacher, and the insight and ability to bring the business community into cooperative alliance with the school.

Professional Development

Professional development by the marketing education teacher should be viewed as an opportunity rather than an obligation. Professional development allows the marketing education teacher to enhance their knowledge, skills, and attitudes. Technical competencies and professional competencies are essential to keep students current with the changing workplace.

Technical competencies refer to the teacher's responsibility to help students develop the qualifications needed to enter and advance in their chosen career. These competencies are associated with the various technical areas taught in the marketing education curriculum. Technical competencies are developed through participation in learning activities and on-the-job experiences.

Professional competencies refer to the required roles of the marketing education teacher's job. In addition to involvement in school committees, in-service conferences, development of student leadership, and membership and participation in professional associations at the state and national level provide the marketing education teacher opportunities to develop their professional competencies.

To obtain professional certification in marketing education the following standards for secondary and postsecondary instructors are required:

1. Two years or 4,000 hours of approved occupational experience as determined by the nature or level of employment in marketing occupations.

2. Twenty-five semester hours of appropriate course work. Fifteen of the 25 must be in courses classified as marketing. The other ten hours may be in additional marketing courses, or in general business, to include two semester hours of economics and three semester hours of management or business administration.

To obtain professional certification in secondary marketing education the following standard is required:

1. Twenty-four semester hours of professional education. A minimum of eight hours of professional vocational education is required. Of these eight hours, one course must be in methods of teaching marketing education, one in curriculum for marketing education, and one in coordination techniques. If these three do not total eight semester hours, others such as Philosophy of Vocational Education may be counted as electives.

   NOTE: For addition information, refer to the "Missouri Certification Standards for Marketing Education Teacher-Coordinators," Appendix 2A, and "Missouri Certification Standards for Postsecondary Marketing Education Faculty," Appendix 2B. A copy of the application for a Missouri Vocational Certificate is in Appendix 2C.

To obtain vocational teacher re-certification, send a letter along with appropriate documentation to:

Director of Marketing and Cooperative Education
Department of Elementary and Secondary Education
P.O. Box 480
Jefferson City, MO 65102

SECTION 3

PROGRAM DEVELOPMENT

Planning for the marketing education program should begin at least a year in advance. Contact the State Director of Marketing and Cooperative Education at the Missouri Department of Elementary and Secondary Education for dates to submit an application for program approval.

Administrative approval must be obtained before initiating a new program or adopting necessary policies. Conducting surveys of the occupational needs in the community and student interest provides information for the program development process. Operational procedures need to be adopted. The curriculum and enrollment procedures should be determined.

Interest in starting a marketing education program may begin with a vocational teacher, vocational director, school administrator, and or local business/industry representatives.

The following steps outline a suggested planning process for the initiation of a marketing education program.

Step 1. Determine need and feasibility

A. Request assistance in determining the need for the marketing education program from the State Director of Marketing and Cooperative Education.

B. Contact key individuals among employer, school, service organizations, and other agencies regarding the feasibility of initiating a marketing education program.

C. Appoint a steering committee.

D. Have the steering committee initially meet to determine the following points:

1. Function of the committee.

2. Goals and objectives of the proposed marketing education program.

3. General knowledge about the marketing education program.

4. Proposed plan of action.

E. Conduct surveys of current and former students to determine student needs and interests. Determine which local businesses currently employ students.

F. Conduct a local business survey to determine the number and types training stations available. Sources of assistance in gathering occupational data include:

1. Steering committee

2. Chamber of Commerce

3. State Employment Security Office

4. United States Census statistics

5. Service groups

6. Labor groups
7. Guidance counselors
8. Trade associations
9. School placement and follow up officer

G. Determine whether the marketing education program will fit into the total school program

1. Are there sufficient physical facilities available?
2. Can instructional materials be obtained?
3. Can the school meet the requirements of the Missouri State Plan?
4. Are instructional personnel available?
5. Is the school near enough to the centers of employment in the community so that students can get to the training station from home and school without difficulty?
6. How many students in the school are now employed?
7. Which (how many) courses must be added to establish an effective marketing education program?

H. Determine the feasibility of offering a marketing education program.

1. Current and former student survey.
2. Local business needs survey.
3. School board recommendations.
4. Guidance counselor recommendations.
5. Faculty recommendations.

I. Develop a tentative written plan that includes the following: philosophy, goals, policy formation, procedures, responsibilities of various personnel, organizational structure and general supervision, advisory board functions, and estimated program budget.

Step 2: Initiate the Marketing Education program

A. Select and hire the teacher.

1. Determine the number of part time and/or full time teachers required.
2. Recruit for qualified certified teachers (For certification standards please see Appendix 2A).

3. Consider state requirements and essential personal characteristics when selecting a teacher using the following questions as a guide:

   a. Does the teacher have the required professional and technical training for the marketing education program?

   b. Does the teacher have the required occupational experience?

   c. Is the teacher committed to the development of the marketing education program within the community?

   d. Will the teacher be respected by members of the employment community?

   e. Will the teacher be respected as a teacher and faculty member by students and other faculty?

   f. Will the teacher be an active participant in school and community activities?

   g. Is the teacher committed to keep up with changes in the educational and business fields?

B. Develop marketing education operational plan.

1. Decide the type of school/application procedures.

2. Study lead-in courses which students may have already taken and identify prerequisites.

3. Determine credit hours for the related class and cooperative education experiences.

4. Specify how the students' grades will be determined for both the classroom instruction and the cooperative education experiences.

5. Describe characteristics of the students to be served.

6. Identify occupations for which training will be given.

7. Allocate or secure space, classrooms, telephone, office, instructional materials, etc.

8. Identify program advisory committee members.

9. Inform faculty of the marketing education program goals and overall program operation.

10. Inform parents of the marketing education program.

11. Identify students who may benefit from and be interested in the marketing education program.

Step 3: Begin the Marketing Education Program

A. Review budget and make recommendations for needed revisions.

B. Continue to work with steering committee.

C. Interview and obtain additional information on potential students. (For an example of an interview guide, please see Appendix 3A.)

D. Recruit, interview, and select students who qualify for the marketing education program.

E. Arrange with employers for placement of students at training station sites.

F. Hold orientation sessions for perspective students.

Determining Student Need for the Program

When justifying the marketing education program, the school should first establish the fact that the program will serve the needs of the students. Therefore, the justification of the program will necessarily take into account information concerning a wide range of individuals and their needs. The marketing education program may be shown to benefit three groups of individuals.

Former students. Follow up studies should be conducted to show the employment histories of former students. It is important to know what positions graduates have had and what employment problems they have encountered. Factors which may justify initiating the marketing education program are:

1. Periods of extended unemployment after leaving school.
2. Series of unrelated entry level jobs.
3. Sub-minimal or below average income as compared to local cost of living expenses.
4. Expressed needs or desire for training that could have been met through a marketing education program.
5. Employment obtained in occupations in which substantial learning and training could have occurred in a marketing education program.

If it can be shown that the unmet needs of former students could have been served by the marketing education program, a school has justification for initiating a program. It is essential that follow up studies contain reliable and valid data. It is suggested that information be obtained from students who left school one, three, and five years prior to the time of the follow up. (For an example of a student follow up form, please see Appendix 3B.)

Current Students. There are a number of factors to consider when determining the needs of students within the school. It is recommended that students have had some exploratory career education and it is important that students have developed some criteria for planning their own vocational development. Factors that should be considered in justifying the need for the program include:

1. Students' career plans and interests.
2. Students' plans for further education.

3. Students' interests in marketing related occupations for which training is available.

4. Students' need to work in order to remain in school or to obtain further education.

5. Students' current type of employment, hours worked, income earned, and job security.

6. Students' perceived relevance of the school's current offerings for personal needs.

In addition to the information obtained directly from students, other faculty members may be able to provide relevant information. Through their association with various students, other faculty may know which students might benefit from the practical learning experiences available in a marketing education program and thus provide further justification for the initiation of such a program. The teacher needs to work closely with faculty, staff, and administrative personnel in developing positive attitudes toward the marketing education program. Their support is vital to the success of the program.

Determining Occupational Need for the Program

Employer interest and support must be determined early in the planning process because without them the marketing education program can not effectively exist. Employers should be made aware of the opportunities that the program provides. The employers should be encouraged to view the program as a source of quality part time employees as well as a future source for trained full time employees. Participating in the marketing education program allows an employer the opportunity to fulfill a social obligation by developing effective school-business-community partnerships that benefit student learners. The employment provided to students should be in those marketing related occupations in which the opportunity for promotion and advancement exists. The following kind of information should be obtained from employers.

1. The number of employers who can provide suitable training.

2. The number and types of marketing related occupations.

3. The expected short and long term needs for trained employees in marketing related occupations.

4. Current training needs for marketing related occupations.

5. The number of students for whom employers could provide acceptable learning experiences.

As part of the planning process for implementing a marketing education program, a formalized survey of employers should be conducted that provides the information listed above. This survey not only helps to document the need for the marketing education program but it also assists in committing the employers as part of the school-business-community partnership. (For an example of an employer survey, please see Appendix 3C.)

NOTE: For additional information and guidance, refer to Appendix 3D, "Guide for Submitting Application for Expanding /New Regular Vocational Programs," issued by the Missouri State Department of Elementary and Secondary Education.

SECTION 4

INSTRUCTIONAL PROGRAM

The marketing education program has as its primary focus developing competent workers for marketing occupations. Marketing education programs may be offered as a two year comprehensive marketing curriculum consisting of Fundamentals of Marketing and Advanced Marketing courses. These courses are described in this section. Selected specialized courses that are related to the marketing instructional program are also described in this section and may be offered on a semester basis.

Marketing Education Courses

Course Title: *Fundamentals of Marketing*

Description: An instructional program for students who are interested in a career in the field of marketing and management. This course includes instructional areas designed to provide an understanding of the fundamental marketing processes and an orientation to the American free enterprise system. The program may utilize the Marketing Education Internship to support classroom instruction.

Course code number: 040001
Type of certification: Marketing Education
Type of credit: Elective (one unit for a year long class, for one period per day)
Prerequisite: None required

Course Title: *Advanced Marketing*

Description: An instructional program for students who are preparing for a career in the field of marketing and management. Instruction will prepare students to perform one or more of the marketing functions, such as selling, buying, pricing, promoting, market research, and management. The program may utilize the Marketing Education Internship to support classroom instruction.

Course code number: 040002
Type of certification: Marketing Education
Type of credit: Elective (one unit for a year long class, for one period per day).
Prerequisite: Fundamentals of Marketing

Course Title: *(Supervisory) Management*

Description: An instructional program that generally describes the planning, organizing and controlling of a business, including organizational and human aspects, with emphasis on various theories of management, the knowledge and understanding necessary for managing people and functions, and decision making.

Course code number: 040005
Type of certification: Marketing Education
Type of credit: Elective (one unit for a year long class, for one period per day; 1/2 unit for semester long class, for one period per day)
Prerequisite: None required.

Course Title: *Entrepreneurship*

Description: An instructional program that provides a background for the development and operation of a business starting with the role of the entrepreneur in our economy to development of a business plan and the application of specific marketing skills and concepts within the business environment.

Course code number:	040011
Type of certification:	Marketing Education
Type of credit:	Elective (one unit for a year long class, for one period per day; 1/2 unit for a semester long class, for one period per day)
Prerequisite:	None required.

Course Title: *Free Enterprise Economics*

Description: An instructional program to provide the student with an understanding of the Free Enterprise economic system and application of the Free Enterprise concept to modern business situations.

Course code number:	040012
Type of certification:	Marketing Education
Type of credit:	Elective (one unit for a year long class, for one period per day; 1/2 unit for a semester long class, for one period per day)
Prerequisite:	None required.

Course Title: *Marketing Education Internship*

Description: Students are placed at a place of employment that directly contributes to the development of the competencies necessary for successful employment in the field of marketing. The student must be concurrently enrolled in a marketing course. This is a cooperative vocational educational program and must follow guidelines established for these programs.

Course code number:	040008
Type of certification:	Marketing Education
Type of credit:	Elective (one to two units for either one or two periods per day for a year long employment)
Prerequisite:	Fundamentals of Marketing or Advanced Marketing concurrent enrollment.

If the student enrolls for one hour of credit, they must average ten hours of on-the-job training per week. If the student enrolls for two hours of credit, they must average twenty hours of on-the-job training per week. The student may earn a maximum of two units or credits for completion of the internship.

The marketing education program should consist of, at a minimum, the Fundamentals of Marketing course and Marketing Education Internship. Additional courses may be offered to meet the needs of students and the business community. The following list of specialty courses may be offered on a semester basis as an elective credit. Certification to teach these courses requires marketing education endorsement. Specialty courses include:

Course Title: *Retailing*

Course code number: 040006

Description: An instructional program that prepares individuals to apply marketing skills in retail establishments. Principles, practices and procedures are taught as related to the field of retailing.

Course Title: *Salesmanship*

Course code number: 040007

Description: An instructional program that prepares individuals to apply marketing skills in a selling capacity in any industry, or to advance to more specialized training in marketing.

Course Title: *Business Administration*

Course code number: 040008

Description: An instructional program that generally describes the processes of purchasing, selling, producing, and interchanging of goods, commodities, and services in profit making and non-profit public and private institutions and agencies.

Course Title: *Advertising*

Course code number: 040009

Description: An instructional program that describes the creation, execution, transmission, and evaluation of commercial messages concerned with the promotion and sales of products and services.

Course Title: *Business Ownership and Management*

Course code number: 040010

Description: An instructional program that prepares individuals to undertake the formation and operation of small business enterprises (including franchise operations) for the purpose of marketing a product line or service, with emphasis given to the management, social responsibilities, legal requirements, and risks involved in the conduct of a private enterprise.

Occupational Codes for Marketing Education

Students in the marketing education program have selected the program to prepare for occupational areas in marketing. The training station in which students are placed as a part of the Marketing Education Cooperative Education phase of the program must be appropriate for the occupational category of the marketing education program.

The Classification of Instructional Programs (CIP) designates occupational fields by code numbers. Placements for marketing education programs are typically designated by the code "08" for marketing and "52" for management fields. Occupational listings for these codes are as follows:

Occupational Codes for Marketing

- 08.01 Apparel and Accessories Marketing
    - 08.0101 Apparel and Accessories Marketing, General
    - 08.0102 Fashion Merchandising
    - 08.0103 Fashion Modeling
    - 08.0199 Apparel and Accessories Marketing, Other
- 08.02 Business and Personal Services Marketing
    - 08.0204 Business Services Marketing
    - 08.0205 Personal Services Marketing
    - 08.0299 Business and Personal Services Marketing, Other
- 08.03 Entrepreneurship (Marketing)
    - 08.0301 Entrepreneurship (Marketing)
- 08.04 Financial Services Marketing
    - 08.0401 Financial Services Marketing
- 08.05 Floristry Marketing
    - 08.0503 Floristry Marketing
- 08.06 Food Products Marketing
    - 08.0601 Food Products Marketing, General
    - 08.0606 Food Retailing
    - 08.0699 Food Products Marketing, Other
- 08.07 General Marketing Operations
    - 08.0701 Auctioneering
    - 08.0704 Buying
    - 08.0705 Retail Marketing Operations
    - 08.0706 Selling
    - 08.0708 General Marketing Operations
    - 08.0709 Distribution
    - 08.0799 General Marketing Operations, Other
- 08.08 Home and Office Products Marketing
    - 08.0809 Home products Marketing
    - 08.0810 Office Products Marketing
    - 08.0899 Home and Office Products Marketing, Other
- 08.09 Hospitality and Recreation Marketing
    - 08.0901 Hospitality and Recreation Marketing, General
    - 08.0902 Hotel/Motel Services Marketing
    - 08.0903 Recreation Products/Services Marketing
    - 08.0906 Food Sales
    - 08.0999 Hospitality and Recreation Marketing, Chair
- 08.10 Insurance Marketing
    - 08.1001 Insurance Marketing

- 08.11 Tourism and Travel Services Marketing
    - 08.1104 Tourism Marketing
    - 08.1105 Travel Services Marketing
    - 08.1199 Tourism and Travel Services Marketing, Other

- 08.12 Vehicle and Petroleum Products Marketing
    - 08.1203 Vehicle Parts and Accessories Marketing
    - 08.1208 Vehicle Marketing
    - 08.1209 Petroleum Products Marketing
    - 08.1299 Vehicle and Petroleum Products Marketing, Other

- 08.13 Health Products and Services Marketing
    - 08.1301 Health Products and Services Marketing

- 08.99 Marketing Operations, Other
    - 08.9999 Marketing Operations, Other

Occupational Codes for Business Management and Administrative Services

- 52.02 Business Administration and Management
    - 52.0201 Business Administration and Management, General
    - 52.0202 Purchasing, Procurement, and Contracts Management
    - 52.0203 Logistics and Materials Management
    - 52.0205 Operations Management and Supervision
    - 52.0206 Non-Profit and Public Management
    - 52.0299 Business Administration and Management, Other

- 52.06 Business/Managerial Economics
    - 52.0601 Business/Managerial Economics

- 52.07 Enterprise Management and Operation
    - 52.0701 Enterprise Management and Operation, General
    - 52.0702 Franchise Operation
    - 52.0799 Enterprise Management and Operation, Other

- 52.09 Hospitality Services Management
    - 52.0901 Hospitality Administration/Management
    - 52.0902 Hotel/Motel and Restaurant Management
    - 52.0903 Travel-Tourism Management
    - 52.0999 Hospitality Services Management, Other

- 52.10 Human Resources Management
    - 52.1001 Human Resources Management
    - 52.1002 Labor/Personnel Relations and Studies
    - 52.1003 Organizational Behavior Studies

- 52.11 International Business
    - 52.1101 International Business

52.14 Marketing Management and Research
  52.1401 Business Marketing and Marketing Management
  52.1402 Marketing Research
  52.1403 International Business Marketing
  52.1499 Marketing Management and Research, Other

52.15 Real Estate
  52.1501 Real Estate

52.99 Business Management and Administrative Services, Other
  52.9999 Business Management and Administrative Services, Other

The variety of occupations in marketing necessitated the organization of the field in to the clusters listed above. Some firms' activities may include several of these clusters, while others may specialize in just one cluster or one segment of one cluster.

Marketing Education Curriculum

The content for all courses in the marketing education program is based on the discipline of marketing and is the foundation for instruction. The curriculum includes the core competencies established for each course and reflects current theory, methods, and marketing practices as well as addressing current and future needs of the marketing industry.

Fundamentals of Marketing and Advanced Marketing units identified in the Missouri core curriculum for marketing education are:

Communications in Marketing
Economics Concepts
Employment and Advancement
Human Relations in Marketing
Marketing Operations
Marketing Planning
Advertising and Sales Promotion
Selling
Marketing Concepts

Note: Learner outcomes and core competencies for Fundamentals of Marketing can be found in Appendix 4A, and Advanced Marketing can be found in Appendix 4B.

(Supervisory) Management units identified in the Missouri core curriculum are:

Functions of Management
Study of Management
Planning
Decision Making
Controlling
Organizing
Directing
Communications
Motivation
Leadership
Government Regulation
Information Systems and Management

Note: Learner outcomes and core competencies for (Supervisory) Management can be found in Appendix 4C.

Entrepreneurship units identified in the Missouri core curriculum are:

- Exploring Entrepreneurship*
- Success and Failure of Entrepreneurs*
- Location and Ownership*
- Government Regulations
- Start-Up Finance*
- Financial Management
- Control and Risk*
- Managerial Resources
- Record Keeping*
- Marketing*
- Marketing Management*
- Personnel Management*
- Community Relations*

Note: *These units are identified as a minimum core for a one-semester course in Entrepreneurship in the marketing education curriculum. Core competencies for Entrepreneurship can be found in Appendix 4D.

Free Enterprise Economics units identified in this Missouri core curriculum are:

- Economic Systems
- Scarcity and Choices
- Measuring Economics Systems
- Supply and Demand
- Profit
- Competition
- The Role of Money and Banking
- Role of the Consumer
- The Role of the Work Force
- The Role of Government
- Types of Business
- The Role of Production
- The Role of Marketing
- International Economics

NOTE: Core competencies for Free Enterprise Economics can be found in Appendix 4E.

Curriculum Development for Marketing Education

Curriculum development is a carefully designed process that consists of identifying educational goals, obtaining school and community related information, and making curriculum decisions as to the content and how the curriculum will be structured. Curriculum development is an ongoing process. It is subject to frequent modifications due to changes in technology, new resources, emerging occupations, and student interest and abilities.

The process for developing curriculum for marketing education involves five steps. Following these five steps will ensure that the curriculum remains relevant and is valid. The five steps are: (1) determining instructional objectives, (2) specifying performance standards and criterion measures, (3) selecting instructional content, (4) developing learning experiences, and (5) selecting instructional materials, resources, and equipment.

1. Instructional Objectives. Competencies needed to perform the tasks in marketing occupations provide the basis for the selection of instructional objectives. Competencies have been identified for each course in the marketing education curriculum and are organized under one of nine major units within the course (refer to the "Core Competencies" for each course in the Appendix). It should be noted that the objectives and competencies are identical except for the mode of expression. The instructional objectives are precise, measurable statements of particular behaviors to be completed by the student under specified conditions. The objective has the activity identified, the level of performance, and the condition under which the performance will take place.

2. Performance Standards. The second step in developing curriculum for marketing education is to specify the performance standards by which the instructional objectives will be measured. Performance standards provide a base for program evaluation. The teacher will develop the specific standards and criterion references to serve as a basis for evaluation.

presented to adequately cover each unit. Instructional content becomes the foundation as to what it is the students need to know and understand to prepare them for employment.

4. Learning Experiences. The fourth step in developing curriculum for marketing education is to identify and integrate those learning experiences that will enable the student to apply what takes place in the classroom with on-the-job, DECA, or other community based experiences.

5. Materials and Equipment. The final step in developing curriculum is to identify appropriate instructional materials, resources, and equipment that will support instruction. The items include reference materials, curriculum guides, audio-visual equipment, software, trade publications, periodicals, and equipment. Materials and resources should be identified for each of the nine curriculum units.

Student Assessment of the Marketing Education Competencies

Traditionally, teachers have determined whether students have met the learner outcomes through the process of "testing" - students responding in writing to specific questions within a specific time period. Today, teachers are replacing or supplementing these tests with alternative assessment methods. The concept of assessment broadens the view of how one can measure student performance on the learner outcomes. Assessment is defined as any number of methods which may be used to obtain information as to the student's knowledge, skills, and abilities as they relate to the competencies for a marketing education course.

Student assessment of the marketing education competencies provides a challenge to teachers. Assessment of the competencies is appropriate in marketing education courses to ensure that students have obtained the essential knowledge, skills, and abilities to perform on the job. Types of student assessments include:

1. Standardized Tests. Standardized tests are normally thought of as multiple choice tests; however, the goal of a standardized test is simply to make the test scores comparable and provide an equal chance for all students to demonstrate what they know. Criterion-reference tests assess student performance in terms of a specific set of knowledge and skill. Students are given a task to do and they are evaluated by established standards or criteria of performance. Norm-reference tests score a student's performance based on the performance of others. Typically they include a fixed set of items along with specific instructions for test administration and scoring.

2. Competency Based Tests. Competency based tests are criterion-reference tests applied to a specific curriculum unit. The test consists of specific tasks evaluated by predetermined standards of performance at different levels of difficulty.

3. Performance Assessment. In a performance assessment students demonstrate competency directly by producing information on the mastery of a skill rather than by simply displaying knowledge indirectly. Students demonstrate an activity and then are evaluated on their knowledge in use and ability to apply skills.

Instructional Delivery

Classroom learning involves the marketing teacher and students to be involved in interactive situations, and the opportunity for the student to be actively engaged in the learning process. The marketing education curriculum supports classroom activities that are cooperative in nature, and enable the student to be involved in the planning and conducting of learning activities. Besides classroom instruction, the marketing teacher has other instructional approaches to utilize in delivering the marketing education curriculum. These approaches include:

Marketing Education Internship. Students participating in the Marketing Education Internship combine supervised part-time employment and classroom instruction. Instructional Management Plans are used to correlate the curriculum with on-the-job training the student receives.

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Project Method. Since some students may not be able to participate in the Marketing Education Internship phase of the program for various reasons, a project method which correlates classroom instruction with a series of learning activities and projects related to the curriculum may be utilized. Projects may include visiting trade exhibits, reading trade journals, comparing various types of businesses in the community, or completing a DECA-related activity.

Variations of the project method may also include the following activities:

School-Based Enterprise - an activity in which the students produce goods or services for sale or use by people other than themselves. The school store allows students to sell merchandise and services to students, faculty, and in some cases the general public. Students are provided the opportunity to conduct an actual business on the school premises.

Job Shadowing - students follow an individual as they perform workplace tasks for a designated number of days. In this activity, the student experiences the work environment and better understands the types of skills needed for specific occupations.

Mentor - a member of the business community works with a marketing education student. The business person can help the student gain experience and training. The student is provided the opportunity to get along with others and to deal with real-world situations.

DECA - DECA is an integral part of the marketing education program. A key principle is that the chapter activities should complement, supplement, and strengthen instruction. Combined with classroom instruction and Marketing Internship or simulated learning experiences, chapter activities should round out and enrich the total instructional program.

SECTION 5

COOPERATIVE EDUCATION

Cooperative education has as its central focus the development of occupational competence, using employment in the workplace as the key source of learning. The nature of cooperative education involves the coordination of classroom instruction with supervised on-the-job training. The marketing education teacher selects the training station that will provide the best occupational experiences needed by the students. Students are supervised by the teacher. Cooperative education program features that enhance the effectiveness of this program include

- Screening of the student to assure that they are prepared to meet the employer's expectations.
- Selection of the employer who will provide training in occupations with career paths
- Adherence to the training agreement outlining the responsibilities of the student, employer, school, and teacher.
- Development of the instructional management plans by the employer, student, and teacher to correlate the curriculum with work-based learning.
- Supervision of the student by the teacher.

Essential components of the cooperative education program include the training sponsor, training station, training agreement, instructional management plans, and evaluation forms. Each of these components are described below and appropriate examples are in the appendix. Cooperative vocational education requires specific policies to be adhered to in order to insure quality on-the-job training. These policies, as outlined by the Missouri Department of Elementary and Secondary Education, are provided in Appendix 5A.

Training Station

The teacher works with the student when selecting the training station which matches the student's career interest and needs. Once the student has been placed at an appropriate site, the teacher's role becomes one of planning and implementing the intern program for each student. The success of the cooperative education program depends upon the training station, therefore only those businesses which maintain high standards should be utilized.

To ensure that businesses with high standards are utilized, some policies and practices to consider in selecting the training station include:

(a) salary scale in comparison to those paid for similar occupations in the community;

(b) opportunities for the student to advance within the business;

(c) work standards and efficiency of operation;

(d) hiring, promotion, and dismissal practices;

(e) working conditions, facilities, and equipment;

(f) hours of employment;

(g) interest in participating with the school;

(h) relationships with labor groups and other employers; and

(i) financial stability.

After the teacher obtains a training station that will provide the appropriate training for the student, a meeting is scheduled with the potential training sponsor to review the purpose of the cooperative education program and how the program will work during the school year.

Training Sponsor

The training sponsor is an experienced employee, supervisor, or manager who will be directly responsible for the occupational learning experiences of the student on-the-job. The training sponsor should have the technical competencies in the jobs to be taught to the student.

They should have the ability to adapt job instruction to the learning style and capabilities of the student. They should be skilled in human relations and be sensitive to the student's needs for recognition, guidance, and direction. The employer's ethics and work habits should serve as a model for the student to emulate.

The employer should be willing to work with the teacher in planning the instructional management plans and other appropriate on-the-job learning experiences to support the classroom instruction. The employer will complete a quarterly evaluation for the student to assess their performance.

Training Agreement

The training agreement is a written document that outlines the specific responsibilities of the student, training sponsor, parents, teacher, and the school. Signatures from each of these individuals should be obtained on the training agreement and a copy provided to these individuals for future reference. The training agreement should be prepared by the teacher and discussed with the employer and student. Although the training agreement is not a legal document, it serves as an "informal agreement" which, except for just cause, should be honored by all parties involved.

Specific features of most training agreements include:

1. Clarification of program policies and procedures.
2. Statement of the student's career objective.
3. Dates of beginning and end of training period.
4. Beginning rate of pay, proposed increases during the school year, and working hours.
5. Responsibilities of the student, training sponsor, school, teacher, and parents.
6. School credit to be earned by the student.
7. Statement of procedures to be followed if a student will be absent from work or school.
8. Agreement of the training sponsor to evaluate the performance of the student on a quarterly basis for grading purposes.
9. Statement that the teacher will make regular visits (a minimum of one per quarter) to meet with the student and training sponsor.
10. Names and signatures of the student, training sponsor, teacher, parents, and school official.

For additional examples of training agreements, please see Appendix 5B.

Instructional Management Plans (IMP's)

Underlying the concept of Instructional Management Plans (IMP) is the correlation between the curriculum of the marketing education program and sequenced application experiences for the student. The IMP serves as a master plan for the teacher, training sponsor, and student. The development of the IMP for any marketing education student should focus on the student's stated career objective. The student's career objective provides for the relevant instructional discipline of curriculum knowledge to be established. It is from this curriculum base that the IMP is formulated.

Application experiences are those activities designed to assist the student in reaching their career objectives. This includes classroom, on-the-job, and vocational student organization activities. Although the IMP ordinarily lists the on-the-job learning activities in reference to an outline of classroom instruction, a complete IMP will have specific tasks of the student's part-time job which are important learning experiences and should be detailed on the IMP. However, if the student is to obtain experiences in related job tasks and in experiences that will prepare them for advancement, it is necessary to design application experiences that both the employer and the student feel are appropriate and feasible. Some of these application experiences may involve observation of the job, interviews with the manager or other employees, and/or consultation with the employer to obtain information. Writing the report of such observations and interviews may be done at home, or at times, in the classroom, but the activity should be specified as on-the-job because this is the source of the information.

At the beginning of the cooperative arrangement, the teacher should share the curriculum with the training sponsor to include course outline, course syllabus, and an overview of IMP activities. In many instances the training sponsor may be helpful in designing application experiences that would be more directly feasible and practical within a specific occupational area. Periodically the teacher, while on coordination visits, should advise the training sponsor of the competency areas which will be covered in the next period of instruction and of the application experiences on which the student will be working. Classroom instruction and on-the-job experiences can be organized into a truly cooperative education experience if the student can use their on-the-job experiences in the classroom and if the training sponsor can be involved in their "employee's" classroom activities.

The use of the IMP by the teacher within their program should provide application experiences for the student that will provide a better insight into the occupational area, the job, and develop job skills for the individual student. For an example of an IMP, please see Appendix 5C.

Coordination Visits

The teacher will conduct regular visits to the training station. To make coordinator time productive, the teacher should carefully plan their calendar, make appointments in advance if they will need to meet with the training sponsor, and keep a log of their activities (For an example of a coordination visit report form, please see Appendix 5D). The purpose of these visits include:

1. Providing a means for the training sponsor and teacher to evaluate the student's work experience. In addition, the teacher can determine if adherence of the training station to the training agreement is in place, evaluate the student's progress, and insure that proper training methods are being used.

2. Observing the student on-the-job. The teacher can ascertain how other employees seem to react to the student, see how the student meets and serves the customers, and shows the student that the teacher is interested in their career development.

3. Developing new training stations and assisting employers with upgrading existing positions. This is accomplished by being aware of coop activities and objectives, securing publication or other current materials that can be used in the classroom, and soliciting participation in school and other promotional related activities.

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Evaluations

Evaluation will assess the student's progress and overall performance for a specified time period. The evaluation is an important component in determining a grade for one or more units of school credit, and also serves as a basis for determining additional training. The evaluation form should include an assessment of the application experiences outlined in the IMP, general worker traits, and personal traits.

Evaluation forms should be delivered to the training sponsor within one week from the end of the quarter to ensure adequate time for the evaluation form to be completed. To ensure an understanding of the evaluation, the teacher should schedule a meeting with the training sponsor and student to discuss the completed evaluation. This meeting will allow the student and teacher to inquire as to the overall rating, and to identify the additional technical competencies that the student will be learning in the next quarter. Examples of evaluation forms for marketing competencies and general workplace characteristics can be found in Appendix 5E.

Other Cooperative Education Forms

The teacher has the responsibility for maintaining records for each student enrolled in the cooperative education program. Typical information collected includes weekly time sheet to list hours worked, pay record for semester, weekly summary sheets reporting what was learned on-the-job this past week, and vocational student organization participation. Documentation on file of the hours worked by the student will verify the number of school credits the student may be eligible for. For additional examples of cooperative education forms, please see Appendix 5F.

Off-Campus Programs

Juniors and seniors in high school may have the opportunity to enroll in school directed and supervised learning experiences that are not part of the regular school setting. The five programs include: academic, cooperative vocational education program, work experience for special education students, career exploration programs, and apprenticeship programs. Programs approved off-campus must be approved by the Department of Elementary and Secondary Education. The policy on granting credit for off-campus programs is in Appendix 5G.

SECTION 6

VOCATIONAL STUDENT ORGANIZATION

One component of the marketing education program is a vocational student organization. In marketing education this organization is called DECA. DECA is co-curricular in nature in that it, the cooperative education work experience, and classroom learning are all parts of the student learning experience that must be blended together into one cohesive individualized program.

DECA is a national organization with state and local chapters; there are also secondary and postsecondary student organizations within this framework. DECA activities provide students the opportunities to develop or improve abilities in leadership, scholarship, citizenship, cooperation, and self confidence by participating in civic, social, professional and recreational activities. Students should be strongly encouraged to join the vocational student organization as it is part of the total marketing education curriculum.

The teacher serves as the advisor to the local DECA chapter. The advisor should assist with all DECA activities. The teacher should strive to correlate DECA activities with related classroom and cooperative education experiences. The DECA experience can be a valuable tool in helping students explore and choose a career field and in helping the teacher recruit students into the marketing education program.

DECA as a Co-Curricular Component of the Marketing Education Program

DECA activities must be properly planned to integrate with the other components of the instructional program. These activities often reinforce classroom and cooperative education learning experiences. DECA activities can also provide learning experiences and situations that are not available in the other program components. These activities provide real life experiences that contribute to the total development of the student.

Members of an active DECA chapter develop leadership and interpersonal skills as they engage in individual and group activities, hold offices and direct the activities of the group, work with representatives of other student organizations, and compete with other students at local, state, and national levels. DECA activities may increase students' career preparation and awareness by providing the opportunity to visit successful individuals from business and industry.

The variety and number of DECA activities and projects depends primarily on the advisor and the students' creativity, ingenuity, and willingness to work. In determining projects or activities, consideration should be given to the learning experiences that it will provide for the students. DECA is a student organization with the teacher serving as an advisor. Students should take the lead in setting goals and planning the organization's activities. These activities usually fall into one of five general types but are not limited to these particular areas. Any activity conducted by the local DECA organization should integrate with and strengthen the entire marketing education program's ability to enhance the student's learning experience.

Professional Activities

DECA contributes to the student's professional growth by utilizing guest speakers, demonstrations, discussions, seminars, videotapes, and electronic dissemination of information that supports and expands the students learning experience related to various occupations. Field trips are commonly used to reinforce and highlight topics and competencies discussed in class or at the training station.

Competitive events are considered professional activities. These events stimulate student interest in improving career related knowledge and emphasize the importance of self directed learning, participation, and preparation. Many of these competitive events are directly related to a specific career cluster that the student has indicated an interest in. Achievement is recognized at the district, state, and national levels.

Civic Activities

Civic activities are conducted by student organizations to serve the school and the community. These activities are often conducted in conjunction with local businesses, civic groups, or other school organizations. Projects include school improvement activities, community wide events, and participation at fairs and shows.

Service Activities

Service activities emphasize the need for understanding and sharing with others. Projects are frequently planned to coincide with holiday activities. Activities are often planned to assist those in the community less fortunate than others, and may include the students interacting with senior citizens, hospital patients, economically disadvantaged families, and recognized charitable organizations.

Social Activities

Social activities are designed to improve those social skills that may contribute to employability. Often, planned professional activities provide the student the ability to improve their social skills, particularly their interactions with professional, business, and civic leaders. It is recommended that such community leaders be invited to participate in organizational activities so that the students may develop their social skills and build a network of local contacts.

Most DECA organizations sponsor an end of the year employer banquet. This activity allows the students to plan an activity which brings together students, school officials, employers, business and civic leaders, and other interested individuals.

Financial Activities

Fund raising activities are designed to support the financial obligations of the DECA chapter. Typical expenses are travel funds for members, expenses for delegates at conferences, field trips, professional and social meetings, and communications. All fund raising activities must comply with local school policies and regulations.

Starting a Local Vocational Student Organization

The initial step in starting a DECA chapter should be to contact the State Advisor for guidance and assistance. For additional information on starting a DECA chapter, please contact:

DECA State Advisor
Department of Elementary and Secondary Education
P. O. Box 480
Jefferson City, MO 65102

The following steps and suggestions can be used to organize a DECA chapter and to develop its program of activities.

1. Consult the principal or vocational director concerning local school rules governing clubs.

2. Order an official handbook from DECA national headquarters:

   DECA
   1908 Association Drive
   Reston, VA 22091

3. Gain interest among students in marketing and business classes or other student organizations.

4. Visit a DECA chapter at another school.

5. Interested students should form a "Committee to Organize" that performs the following duties:

    - Become familiar with the basic documents and promotional materials of the organization
    - Order necessary promotional materials to initiate a membership campaign
    - Write a tentative constitution
    - Conduct an organizational meeting of potential members
    - Plan the election of officers
    - Review, alter, and ratify constitution
    - Solicit faculty and administrative support
    - Study parliamentary procedure

6. Kickoff the membership campaign and begin to collect dues.

7. Conduct elections. It is recommended that this date be the deadline for dues to be paid.

8. Hold meeting for newly elected officers. Petition state association for a local charter. Forward membership dues to state association. State association will forward national dues to national office.

9. Plan the chapter's program of activities. Organize or appoint appropriate committees to conduct activities. Suggested committees include: Finance, Public Relations, Social, Community Service, Special Committees.

10. Secure space, equipment, and supplies required to conduct chapter meetings. Encourage and offer opportunities for all members to participate in chapter activities.

DECA Resources

DECA publishes a handbook entitled *Chapter Management System* which is available from the national headquarters. Activities such as starting a DECA chapter, parliamentary procedure, program of work, sales projects, and officer installation ceremonies are outlined. This system is published in a loose leaf binder and is helpful to both new and experienced advisors.

Through National DECA, chapters receive annual services as the *DECA Guide*, DECA calendars, sales projects, DECA approved clip art, and career development posters. Member services include membership cards and pins, subscriptions to *DECA Dimensions*, scholarship opportunities, and leadership experiences. Other promotional items are available through a catalog service.

National DECA provides the following items at no cost for affiliated chapters:

DECA Dimensions - a member's journal published 4 times a year

DECA Advisor - an advisor's journal published as a companion to *DECA Dimensions*

DECA member and advisor pins and membership cards - forwarded in response to DECA Roster

DECA calendars and posters - compliments of National DECA Advisory Board

DECA Images Catalog - illustrating member, chapter and advisor gift and reward items. Chapter management and competition support items.

DECA Guide - provides a description of DECA events with guidelines and evaluation methods

Missouri DECA is divided geographically into 12 districts. These districts are organized through the leadership of teacher who work together to conduct leadership activities and competitive events. Many student activities take place, initially, at the district level. District Career Development Conferences (CDC) are typically held in mid winter, State CDC in early Spring, and National CDC in late spring. Formal leadership for Missouri DECA is provided by the State Action Team.

SECTION 7

ADVISORY COMMITTEES

The role of the marketing education teacher in developing and working with a marketing education advisory committee is critical to the effectiveness, value, and success of the committee. The advisory committee consists of representatives from the business community who share an expert working knowledge of the job tasks and competency requirements for marketing and related occupations. The committee's role is to suggest, recommend, and assist the local program with issues related to the overall instructional program.

The committee provides advice in areas such as occupational performance competencies, curriculum development, student placement, community public relations, equipment and facilities, program evaluation, occupational and community surveys, and community resources. Advisory committees promote necessary change within the marketing education program, generating and transmitting any ideas to the program from the employment community and from the program to the employment community.

Types of Advisory Committees

Administrative Advisory Committee - organized for the purpose of improving two-way communication between area vocational schools and those schools sending students to area vocational schools. The committee's primary role is to consider schedules, calendars, new programs, transportation, and other items that are necessary for the committee to consider.

General Advisory Committee - specific purpose is to advise the vocational administrator regarding the overall program operation and improvement for the total vocational education program. Primary function is to advise in planning, recruitment, placement and public relations.

Ad Hoc Advisory Committee - short term appointment to a committee for the specific purpose of addressing any special problem that may arise within the marketing education program.

Establishing an Advisory Committee

The marketing education teacher should consult with the appropriate administrator or school personnel involved in the establishment of the advisory committee. Before a committee is established, approval should be obtained from the appropriate authority within the school. Following the approval of the committee, the local board adopts a resolution or authorization statement supporting the establishment of the marketing education advisory committee. The following steps will serve as a guide in establishing your local advisory committee.

Step One: Selection of Committee Members

> Membership to the marketing education advisory committee should be representative of the occupational areas served by the marketing education program and a cross-section of the business community. The marketing education teacher and the appropriate administrator should develop a list of potential members. Members may be selected to represent both labor and management, geographical sections of the business community, types of businesses that represent the occupational areas, former marketing education student, and parents.
>
> Individuals to serve on the advisory committee should represent a community cross-section in terms of gender, race, occupations, and socio-economic status. Other factors to consider when nominating members for the committee are their overall interest, availability, character, and experience in the field.

Step Two: Appointment of Advisory Committee Members

The size of the marketing education advisory committee will vary depending upon the scope of the program, diversity of businesses in the community, and the purpose of the committee. A committee with five to seven members is recommended. Members are typically appointed to a three year staggered term to ensure both continuity and ability to accommodate change.

Members to the committee may be invited by the marketing education teacher or appropriate administrator (see Appendix 7A for generic letter of invitation for advisory committee members). Once the member has agreed to serve on the committee, and official letter of appointment should be sent by the board stating the term for which the appointment is made (see Appendix 7B for generic letter of appointment to advisory committee).

Step Three: Orientation of Committee Members

Members should be oriented to their responsibilities and tasks by the marketing education teacher and administrator. The orientation should include an overview of the program, tour of program facilities, status of current students and program graduates, employment situations, previous committee work, and current issues. Committee members need to have their questions about the program and their role on the committee set forth in a forthright and honest manner.

Step Four: Selection of Officers

Two officers are typically elected for the advisory committee: a chair and secretary. The chair's role is to provide the guidance and leadership in conducting meetings and to complete the committee's program of work for the year. The marketing education teacher may chair the organizational meeting of the advisory committee. The secretary's role is to record meeting minutes and perform other related duties. The teacher may assume this role, or other school representative due to the access of word processing and reproduction facilities.

Step Five: Conducting Meetings

Items for the agenda should be identified by the marketing education teacher and the committee chair. The agenda should be prepared for each meeting and distributed to the members prior to the meeting when the notice is sent out. The advisory committee should convene a minimum of two times during the school year. Minutes should be kept of each meeting and distributed to committee members following the meeting. Minutes keep interested individuals informed about the committee's concerns, decisions, and activities.

Step Six: Planning a Program of Work

In order to be effective the committee must be highly structured. The committee will develop a program of work that suggests both the long-range goals of the committee, along with short term goals that need to be addressed. The activities on the program of work should then be incorporated into the agendas for each meeting. It is important to note that some flexibility should be maintained in organizing and implementing the program of work.

Step Seven: Recognition of Committee Members

Members will be interested in attending meetings regularly if their talents are used in tasks that involve them with the program, their recommendations are taken seriously, and they are provided feedback about their recommendations and efforts. The best type of noncompensatory recognition are those that increase productivity, improve committee interaction, and increase member satisfaction. Recognition of committee members may include:

- press release announcing member appointment
- invitation to marketing education program activities
- send letters to committee members about the results of their advice and recommendations
- invite school administrator to committee meeting
- recognize committee member on a school plaque or display window
- plaque or certificate

Developing a Program of Work

The following is a list of possible activities which may be helpful in formulating a program of work:

Community Surveys:

1. Assist in planning, conducting, and analyzing community surveys.
2. Assist in identifying new and emerging careers in the occupational field.
3. Assist in identifying training needs for specialized areas in the occupational field.
4. Assist in identifying appropriate occupational careers for the handicapped students.

Career Development:

1. Provide career information about all segments of the occupational field.
2. Participate in "Career Days," P.T.A. meetings, and civic club meetings to encourage young people to seek careers in the occupational field.
3. Arrange field trips.
4. Assist in occupational analyses, showing critical tasks and competencies of jobs in a career-continuum.
5. Assist in determining criteria for selecting students for the cooperative education program.
6. Assist in determining criteria for selecting training stations.
7. Assist in developing training agreement forms for the cooperative education programs.
8. Assist in placing students in jobs as they relate to their career objective and cooperative education programs.
9. Assist graduates in obtaining full-time employment.

Course Content:

1. Assist in the development and review of course content.
2. Evaluate sample Instructional Management Plans for students in the cooperative education program.
3. Evaluate proposals for curriculum patterns in the local school.
4. Assist with identifying and recommending texts and reference materials.
5. Donate trade journals, training materials, and illustrative materials for use in the classroom.
6. Assist with identifying and recommending appropriate instructional materials.

Equipment and Facilities:

1. Support the need for the program and laboratory facilities.
2. Review present equipment and facilities.
3. Seek equipment donations.
4. Assist in surveying equipment currently in use by business.
5. Recommend appropriate technology to integrate in classroom instruction.

Staffing:

1. Provide career experiences for program personnel.
2. Provide financial assistance for program personnel to participate in appropriate state and national professional conferences.

Public Relations:

1. Arrange for presentations by the teacher and students before civic and business groups.
2. Arrange for presentations concerning the program on local television and radio.
3. Appear before the school board and other agencies to report on the progress of the program.
4. Establish an awards program for the outstanding marketing education student.
5. Appear before legislative groups in support of legislation affecting the program and vocational-technical education.

Program Evaluation:

1. Assist in evaluating the overall quality of program instruction.
2. Formulate recommendations for major program revisions and improvements.
3. Assist with the Missouri School Improvement Program (MSIP) review.
4. Assist with the design, implementation and results of follow-up studies of program graduates.
5. Assist in evaluation of adult program offerings.
6. Review evaluative instruments to evaluate certain phases of the program (e.g., Progress reports, Follow-up studies, etc.)
7. Serve as judges at DECA competitive events.

Operation:

1. Assist in establishing immediate and long-range goals for the program.
2. Review proposed program of work activities.
3. Review budget requests to support proposed program of work activities.
4. Analyze need and approve plan for fund-raising activities to support DECA functions.

For additional assistance or information on advisory committees, contact:

Executive Director
Missouri State Council on Vocational Education
P.O. Box 545   600 Monroe
Jefferson City, MO 65102
(314) 751-4384

SECTION 8

FACILITIES, EQUIPMENT, AND RESOURCES

The vocational nature of the marketing education program necessitates that the facilities, equipment, and resources needed to provide an effective instructional environment may differ from other educational programs in the school. Marketing education programs may vary in their needs based on the availability of training stations and the resources available within them; labs, school stores, etc. may be used to supplement or replace coop activities. Where extensive use of coop learning is utilized, consideration must be given to the administrative and organizational needs of the teacher. Consideration must also be given to the special needs students within the program.

Specific needs can not be determined until the program goals and curriculum content have been determined. Requested facilities, equipment, and resources must be related to the program goals, curriculum content, and expected student outcomes. Specific requests and cost projections can be made only after curriculum content has been determined.

Facilities

The marketing education classroom should be of sufficient size, quality, and arrangement that enables the instruction to meet program objectives. Typically, the classroom consists of student tables or desks, a podium, and an area for group discussion or simulations.

The facility should be equipped with proper lighting, adequate ventilation, sufficient electrical outlets, and climate control. Adequate space should exist for computer work stations with network access.

A private office for the teacher is necessary for an effective program. This office is used for counseling students, interviewing students, interviewing employers, and making confidential phone calls to employers. The teacher's office should include a direct telephone line, with answering machine, due to the number of calls that are received from and made to employers and students. The office should also include a desk, sufficient file cabinets, computer and printer, and other standard office supplies. The teacher must have access to or a budget for stationary, stamps, envelopes, business cards, printing/copy services, and other necessary activities required to operate an efficient, effective, and professional program.

Equipment

The following list contains suggested equipment and supplies. It is not a comprehensive list, but rather a guide. Each marketing education program should have equipment required to achieve its program goals.

Computers and workstations
Color laser printers, CD-ROM
Fax machines, laser disk, and satellite services available in the building
VCR units (camera, player/recorder, monitor)
Television with cable hook up
Overhead projector and screen
Camera (35 mm)
Cassette player/recorder
Easel and flip charts
Storage cabinets (with locks)
Paper cutter
Other necessary audio-visual equipment not available through school
Other standard classroom equipment

Adherence to local, state and federal regulations regarding safety conditions should be adhered to. Examples are first-aid kits, fire extinguishers, etc. Contact local school administrators for specific guidelines and assistance.

Instructional Resources

Many types and sources of instructional resources are available for the marketing education program. Selection of appropriate materials is based on several factors, including program goals, student interests, costs and available funds, and teacher preferences. Resources are available for general marketing and specialized marketing courses. The teacher must match instructional resources to the program objectives. Listed below are suggested textbooks that have been cross-referenced with the expected student learner outcomes for the following marketing education program courses.

Fundamentals of Marketing:

Marketing: An Introduction by Stull & Hutt. (South-Western Publishing Company).

Retail Marketing by Meyer, Harris, Kohns, & Stone. (Gregg Division of McGraw-Hill Book Company).

Retail Merchandising by Samson & Little. (South-Western Publishing Company).

Marketing Practices and Principles by Mason, Roth, & Husted. (Gregg Division of McGraw-Hill Book Company).

Advanced Marketing:

Marketing: An Introduction by Stull & Roger Hutt. (South-Western Publishing Company).

Retail Marketing by Meyer, Harris, Kohns, & Stone. (Gregg Division of McGraw-Hill Book Company).

Retail Merchandising by Samson & Little. (South-Western Publishing Company).

Introduction to Marketing by Lynch, Ross, & Wray. (Gregg Division of McGraw-Hill Book Company).

Supervisory Management:

Business Principles and Management by Everard & Burrow. (South-Western Publishing Company).

Introduction to Management Practice by Burke & Bittel. (McGraw-Hill Book Company).

Supervision-Concepts and Practices of Management by Hilgert & Haimann. (South-Western Publishing Company).

Supervisory Management by Mosley, Megginson, & Pietri. (South-Western Publishing Company).

Other suggested textbooks include:

Marketing Essentials by Farese, Kimbrell, & Woloszyk (Glenco Publishing Company).

Starting and Managing the Small Business by Kuriloff & Hemphill (McGraw-Hill Book Company).

Other instructional resources include magazines, journals, and newspapers; films, recordings, and videotapes; software packages which may include simulations; occupational specific curriculum guides; career guidance materials; reception of distance based instructional activities; electronic communications; and Internet resources.

To assist marketing education teachers, the Marketing and Cooperative Education section of DESE maintains a library housed at the University of Missouri-Columbia which provides a free video loan program. There are a wide range of videos available including general vocational education and occupational specific marketing related occupations. Catalogs which contain the titles and descriptions of available videos are available at the address below. For general vocational resources request the catalog titled: *Resources for Vocational Education;* for marketing specific resources request the catalog titled: *Marketing and Cooperative Education Resources*.

Missouri Vocational Resource Center
8 London Hall
University of Missouri-Columbia
Columbia, MO 65211

Phone: (314) 882-9610, (314) 882-1470, or 1-800-392-7217
FAX: (314) 882-9935

The Instructional Materials Laboratory (IML), also housed at the University of Missouri-Columbia, offers a wide range of vocational curriculum materials. Competency profiles, learner outcomes, portfolios, and other marketing and cooperative education materials are available. A catalog of materials and assistance is available at:

Instructional Materials Laboratory
University of Missouri-Columbia
2316 Industrial Drive
Columbia, MO 65202

Phone: 1-800-669-2465
Fax: (314) 882-1992

The Carl D. Perkins Act (reauthorized in 1990) and state funding allow for the purchase of equipment and instructional resources for the program. Matching dollars for equipment purchases may be requested through the Department of Elementary and Secondary Education, Division of Vocational and Adult Education, by filing form FV-4 (see appendix 8A), and reimbursement may be claimed by filing form FV-2 (see appendix 8B).

SECTION 9

PROGRAM EVALUATION

Program evaluation is the process to determine the effectiveness of the marketing education program. Evaluating your program becomes an essential part of the total delivery of instructional programs. The program evaluation process will assist in identifying the program goals that have been accomplished.

To determine the effectiveness of the marketing education program and to identify ways and means to improve its effectiveness, the program should be evaluated in its totality. Student performance alone should not be the only factor evaluated. Other factors which contribute directly or indirectly to the students' performance should also be considered.

Evaluation is an integral part of any decision-making process. Although evaluations can be carried out without any prior planning, the results may be of little practical value. The specific evaluation plan will be determined by the complexity of a given situation. A teacher who chooses to evaluate student performance may not need a formal plan. However, a follow-up of former students may necessitate formulating a plan of action.

Formulating a plan of action will enable those involved in conducting the evaluation to assess "where we are" to "how well we did." Evaluation is important for many reasons:

- Assist in the overall planning
- Assist in the decision making process
- To update program personnel
- To improve the marketing education program for students
- To assure accountability of expenditures
- To meet the numerous mandates for evaluation included in federal and state legislation

Missouri School Improvement Program (MSIP)

The Missouri School Improvement Program (MSIP) is designed to promote excellence in the public schools within the state. Formal implementation of the MSIP began in the fall of 1990. Due to the number of school districts in the State of Missouri, approximately 110 school visits will be conducted over a five year time period. The MSIP will ensure that all schools meet certain basic standards and that the schools continue to strive for excellence in an increasingly competitive world.

The standards are organized in three sections, Resource Standards, Process Standards, and Performance Standards. The Resource Standards are concerned with the basic requirements that all district must meet (i.e. program of studies, class size, professional support staff, administrative support staff, and certification/planning time).

The Process Standards are concerned with the qualitative dimension of schooling and include standards for the marketing education program. Assessment of the Process Standards is accomplished through an on-site review team. Process Standards for Vocational Education are listed below. Indicators identified as starred (*) will be addressed in the written report by the on-site team.

8.3 Vocational Education

8.3 A Vocational Education is an integral component of the district's education program.

* 1. The vocational education program reflects the assessed needs of students, the labor market and the community.

* 2. All students have an equal access to the full range of vocational education programs, services and activities.

* 3. Vocational education enrollment is representative of the total school population.

* 4. Students are provided appropriate support services to enter and succeed in the vocational education program.

8.3 B Competency-based curriculum have been implement to meet the diversified needs of all students and prepare them for entry into the workplace and/or continued education.

* 1. The curriculum for each course/program has identified competencies organized as units of instruction, with appropriate assessment methods and resources.

* 2. An instructional management system exists for reporting student and class mastery of curriculum competencies.

* 3. The curriculum and instructional strategies have been developed which integrate academic and vocational competencies.

8.3 C Vocational student organizations are in place as inter-curricular instructional methods.

* 1. The vocational student organizations (VSO) program provides opportunities for all students to develop personal leadership skills, gain occupational competence and be involved in community and school services.

8.4 D Vocational education programs provide students with assistance in the transition to the workplace and/or continued education.

* 1. Work-site based educational opportunities are available including job shadowing, experiential education, cooperative education or apprenticeships.

* 2. Off-campus program comply with policies established by the Department of Elementary and Secondary Education.

* 3. Articulation agreements have been implemented with postsecondary institutions.

8.3. E The district implements an accountability system to assess student progress and program effectiveness.

* 1. Performance measures and standards have been identified.

* 2. An evaluation based on performance measures and standards is conducted annually.

* 3. Evaluation results are used to improve the vocational education program.

A list of MSIP documents to support the Process Standards are included Appendix 9A.

The Performance Standards include student achievement, educational persistence and post high school status, and plans for the improvement of student performance. This information is collected annually and analyzed as a part of the ongoing monitoring of the school district quality. Specific data collected includes:

- Utilization of the standardized achievement tests and the degree to which students have mastered the knowledge and skills in the curriculum.
- The percentage of juniors and seniors demonstrating adequate preparation for college, to include ACT, SAT, or College Level Examination Program (CLEP).
- The percentage of students who complete the high school education program, to include drop-out rate, and regular daily attendance.
- Follow-up studies to determine graduate involvement and performance enduring the first and the fifth year following graduation from high school.
- District's comprehensive plans to facilitate improvement of students performance (i.e. percentage of students who complete a program of community service, students' self-confidence and respect for others improve, numbers and percentages of students suspended at each grade level, and students who demonstrate competence on writing assessment.

Upon completion of the on-site team visit, a district report is written. The report identifies strengths and concerns, commendations for programs of high quality, and identifies areas that need improvement. Upon receipt of the report, a District School Improvement Plan is written that identifies the time lines, resources need, and action to be taken by the district to address the areas of concerns.

Local Program Evaluation (Yearly)

The local program evaluation of your marketing education program should be a continuous process. The MSIP assures your program being evaluated once every five years. In the absence of the MSIP, a conscientious marketing education teacher will review their program, either formally or informally to identify strength and weaknesses and to provide an overall assessment of the program. Only through this process, can meaningful program revisions and improvement be made.

A marketing education program review team can be developed to review your program. Members to the team may consist of administrative personnel, ancillary personnel, advisory committee members, students, and graduates of the program. Their responsibility will be to review the program and identify weaknesses or deficiencies and recommend modifications. The Missouri Marketing Education Program Improvement Guide (available from the Instructional Materials Laboratory, 80-2005-I, 1991) provides a list of resource standards and indicators to use in evaluating the local program. In addition a Program Improvement Profile provides a list of suggested questions for the review team to consider as part of the on-site evaluation.

The marketing education teacher should also conduct the following types of evaluations to ensure the relevancy and efficiency of the marketing education program. Conducting the following evaluations can provide valuable information for the MSIP and the local program evaluation.

Student Evaluation:

An anonymous end-of-the year course evaluation should be given to students to provide input as to the teacher's method of presentation, interest, classroom organization, and recommendations relative to the course objectives, class activities, evaluation, and overall instructor effectiveness. (See Appendix 9B for Student Evaluation of Instructor form.)

Program Graduate Follow-up:

Students who have graduated from the marketing education program in the spring of the school year should be surveyed during the early part of the following fall semester. This provides the graduate time to have established themselves in either employment or further education. This type of follow-up study is used to obtain information about the extent to which the objectives of the marketing education program were met. In addition information is obtained from former students as to how well the marketing education program prepared them for employment or further education. (See Appendix 9C for Student Follow-Up Questionnaire.)

Employer Evaluation:

At the end of the year, employees should be asked to complete an evaluation form as to how well the student performed on-the-job as part of the cooperative education program. In addition, the training sponsors can provide recommendations for improvement of the marketing education program. (See Appendix 9D for Employer Questionnaire.)

The Missouri Marketing Education Evaluation Guide (available from the Instructional Materials Laboratory, 80-2010-I, 1991) provides additional information and supporting documents to assist with course enrollment summary, conducting the student and employer follow-up study, internship summary report, and a model end-of-the-year report.

Mastery of Course Competencies

By completing the competency profile cards for the Fundamentals of Marketing, Advanced Marketing, Management, Entrepreneurship, and Free Enterprise Economics courses, the marketing education teacher can assess student outcomes. The profile cards will identify those competencies that have been mastered, those that require supervision, and those competencies not mastered at the end of unit. The competency profile cards also assist the teacher in evaluating their instructional effectiveness for each of the nine curriculum units. (See Appendix 4F for competency profile cards.)

There are other systems available to assist the teacher in developing and managing their instructional program. They include: (1) classroom Vocational Administrative Management System (CVAMS) for classroom-based usage, and (2) Vocational Administrative Management System (VAMS) for school-wide usage, and other computer based instructional management systems. Each of these software programs perform the following management functions:

- documents defined learner outcomes and associated instructional management information.
- maintains outcome-specific performance records for each student and can update those records with student's scores.
- prints detailed performance reports for individual students and summary performance reports for class groups.

For further information about instructional management programs contact:

VIMS/VAMS Support Center
324 Townsend Hall
University of Missouri-Columbia
Columbia, MO 65211
314-882-2951

Marketing Education Exemplary Program Award

The Missouri Department of Elementary and Secondary Education has established the MSIP for the purpose of accrediting school districts and providing the direction for improvement of education. While this review emphasizes compliance and adherence to minimum standards, some of the programs under review, and others in the state, far exceed these standards and are in fact of an exemplary nature. The Exemplary Program Award recognizes innovative and high quality programs in marketing education.

Specific purposes of the Exemplary Program Award are:

1. Provide school officials, teachers, and other interested persons an opportunity to observe effective marketing education programs emphasizing established program standards.

2. Motivate school officials, teachers, and other interested persons to develop quality programs emphasizing established program standards.

3. Assist other schools in obtaining practical information to help them improve their programs.

4. Recognize the individual schools that have responded to contemporary needs requiring emphasis of and sound instruction for development of appropriate student outcomes.

5. Promote marketing education programs which have demonstrated excellence.

Applications for the program award include submitting document materials and a self-study completed by the marketing education to include: marketing education program components, a review of the curriculum, instructional environment, student guidance and counseling, professional development, vocational student organization, advisory committee, marketing education program organization and administration, marketing plan, assessment of student performance, and program completers.

Program applications are reviewed by a committee, and the school(s) chosen as a finalist will have the award committee conduct a one day on-site visit. For additional information on the Marketing Education Exemplary Program Award, contact:

Director of Marketing and Cooperative Education
Department of Elementary and Secondary Education
5th Floor Jefferson Building
P.O. Box 480
Jefferson City, Missouri 65102

SECTION 10

LEGAL ASPECTS

Marketing education teachers and program administrators must insure legal and ethical employment situations for students. Utilization of school sanctioned training stations causes the marketing teacher to become familiar with legal aspects unique to most other teachers. Legal considerations provide guidelines for program operation and include a variety of factors such as equal access and labor regulations.

Teachers must know the intent as well as the fine points of the law. Teachers are the link between the school and the business community, as well as representatives of the students. Teachers should be able to explain relevant legal ramifications to all parties (students, employers, parents, administrators, etc.). Issues in which questions commonly occur are work permits, hazardous occupations, working hours, and termination of employment.

Legal problems are best avoided by selecting appropriate training stations and by drawing up a written training agreement which specifies conditions that insure compliance with regulations. If an employer does not manage the business within the law, the teacher should remove the student from that arrangement and seek another training station for the student. If a teacher questions the operating nature or practices of a business it is recommended that no student be placed for employment in that business.

Teachers are responsible for legal employment. While practicing necessary and sufficient caution in selecting training stations for students may decrease the chance of litigation, nothing is guaranteed. Allowing students to continue at training stations that do not comply with the law also damages the image of the teacher, the program, the school, and vocational education in general. However, teachers often can assist an employer who is unsure of or unknowingly not in compliance with relevant legal issues. The teacher must use good professional judgment to insure the welfare of the student.

The teacher should maintain a file containing information on legal matters so that sources can be cited if legal questions arise. Teachers should secure state and federal publications for themselves that describe pertinent laws. As these laws change frequently, it is recommended that publications be requested on an annual basis.

Equal Access

Bias on grounds of race, color, national origin, gender, sexual orientation or physical disability is prohibited in vocational programs. These civil rights statutes and their impending regulations apply to vocational education programs. Discrimination is prohibited in admission, recruitment, treatment, academic requirements, financial and employment practices, non-academic services, and health, welfare, and social services. Teachers should also be aware of similar equal employment opportunity regulations that affect employers of students.

Employment Certificates

No child under fourteen years of age shall be employed or permitted to work at any occupation at any time, with very limited exceptions. Children age 14 or 15 may be employed during the school term only if that child has been issued a work permit. Work permits are issued by or through the superintendent of the school system in which the student attends.

The hours that a 14 or 15 year old may work are limited and include the following standards:

- not before 7 a.m. or after 7 p.m. during school term
- not more than 3 hours per day on school days
- not more than 18 hours per week in school weeks
- not more than 8 hours per day on non-school days
- not more than 40 hours per week on non-school weeks

The types of job placements for 14 and 15 year olds is restricted as well. For a complete list of restricted jobs obtain a copy of the Federal Fair Labor Standards Act and the Child Labor Laws of Missouri. Some common marketing jobs from which 14 and 15 year old students are prohibited include:

- public messenger service
- cooking
- work in freezers and coolers
- loading and unloading goods
- warehouse work (except office and clerical work)
- motels/hotels (except in offices physically separated from sleeping rooms)

Hazardous Occupations

Marketing teachers should be aware of those occupations which are deemed hazardous by the Fair Labor Standards Act. This act provides a minimum age of 18 years for any nonagricultural occupation which the Secretary of Labor "shall find and by order declare" to be particularly hazardous for 16 and 17 year old persons, or detrimental to their health and well being. There are currently 17 hazardous occupation orders in effect that define occupations in which the minimum age for employment is 18. The complete list may be obtained from the Wage and Hour Division of the United States Department of Labor. Common examples of marketing related jobs deemed hazardous include jobs in or about plants manufacturing or storing explosives, motor vehicle driving (with certain exemptions), the use of any power driven machinery such as woodworking machines, bakery machines, metal working machines, meat packing or processing, or roofing work.

Sexual Harassment

Sexual harassment is illegal. It violates Title VII of the Civil Rights Act of 1964. The Equal Employment Opportunity Commission (EEOC) handles most sexual harassment cases and has determined some guidelines. EEOC considers conduct that is (1) unwelcome, and (2) sexual in nature, although intent is not required, to be harassment.

Teachers should address the area of sexual harassment so that students are aware of the appropriate steps to take if they feel they are being harassed in either the workplace or the academic setting. Teachers must be aware that sexual harassment cannot be a condition of employment or grades. Teachers should be prepared to assist students who have questions and concerns in this area.

Additional information may be obtained from:

Project SERVE
Instructional Materials Laboratory
University of Missouri-Columbia
Columbia, MO 65211

Phone: (314) 822-2884

I-9 Form

All employees must submit proof of citizenship status to their employer before employment may begin. Copies of these documents are kept on the employer's premises. Students should be prepared to have two original forms of identification for this purpose; generally the most commonly used records for this requirement are a state issued driver's license or birth certificate and a social security card. For students who do not have these forms of identification, alternate documents may be substituted; employers should have a complete listing of which documents are acceptable. (For an example of an I-9 Form, please see Appendix 10D.)

Minimum Wage

Marketing teachers and students must be aware of those occupations and businesses which are covered by the minimum wage laws. The following employees are covered by Federal Minimum Wage Law.

> All employees of certain enterprises having workers engaged in interstate commerce, producing goods for interstate commerce, or handling, selling, or otherwise working on goods or materials that have been moved in or produced for such commerce by any person are covered by the Act.
>
> A covered enterprise is the related activities performed through unified operation or common control by any person or persons for a common business purpose and is--
>
> 1. engaged in laundering or cleaning of clothing or fabrics; or
> 2. engaged in the business of construction or reconstruction; or
> 3. engaged in the operation of a hospital; an institution primarily engaged in the care of the sick, the aged, the mentally ill or defective who reside on the premises; a school for mentally or physically handicapped or gifted children; a preschool, an elementary or secondary school; or an institution of higher education (regardless of whether or not such hospital, institution or school is public or private or operated for profit or not for profit); or
> 4. comprised exclusively of one or more retail or service establishments whose gross annual income of sales or business done is not less than $362,500;
>
>   (Any retail or service enterprise which has annual gross volume of not less than $250,000 and which later ceases to be a covered enterprise as a result of increases in this dollar volume test must continue to pay its employees at least the minimum wage in effect at the time of the enterprise's removal from coverage, as well as overtime in accordance with the Act.); or
> 5. any other type of enterprise having an annual gross volume of sales or business done of not less than $250,000.
>
> The dollar volume standard mentioned above in (4) and (5) excludes excise taxes at the retail level which are separately stated.
>
> Any establishment which has as its only regular employees the owner thereof or members of the owner's immediate family is not considered part of any enterprise.

Federal employees are subject to the minimum wage, overtime, child labor and equal pay provisions of the Act. Employees of State and local governments are subject to the same provisions, unless they are engaged in traditional governmental activities, in which case they are subject to the child labor and equal pay provisions only. The Supreme Court has indicated that such traditional governmental activities include schools, hospitals, fire prevention, police protection, sanitation, public health, parks, and recreation.

Employees who are not employed in a covered enterprise may still be entitled to the Act's minimum wage, overtime pay, equal pay, and child labor protection if they are individually engaged in interstate commerce. These include --

(a) communication and transportation workers;

(b) employees who handle, ship or receive goods moving in interstate commerce;

(c) clerical or other workers who regularly use the mails, telephone, or telegraph for interstate communication or who keep records on interstate transactions;

(d) employees who regularly cross state lines in the course of their work; and

(e) employees of independent employers who perform clerical, custodial, maintenance, or other work for firms engaged in commerce or in the production of goods for commerce.

Domestic service workers such as maids, day workers, housekeepers, chauffeurs, cooks, or full-time baby sitters are covered if they (1) receive at least $100 in cash wages in a calendar year from their employer or (2) work a total of more than 8 hours a week for one or more employers.

There may be times when students will have to be employed at less than minimum wage in order to prevent a curtailing of employment opportunities. Teachers must be familiar with required Subminimum Wage Certificate Requests (permits or certificates which enable an employer to employ a student-learner at subminimum wage), the process of application, and the conditions governing the issue of the certificate.

The law provides for the employment of certain workers at rates lower than the statutory minimum under the terms of special certificates. Individual certificates are granted for students working part-time in employment related to courses they are studying in school and when such employment has been arranged by the teacher of the marketing education program in the school the student is attending. The employer must file a subminimum wage certificate request for each student they will employ from a marketing education program at less than the minimum wage.

Department of Labor, Wage and Hour Publication 1343, Employment of Student Learners, explains that students employed on a part-time basis pursuant to a bona fide vocational education program may be paid at 75 percent of the current federal minimum wage. The local Wage and Hour Office of the Department of Labor can provide additional information regarding these provisions.

When this certification is used, remember that the equal pay provision prohibits wage discrimination on the basis of gender within an establishment. That is, when a company is subject to the minimum wage, employees of one gender must not be paid wages at rates lower than those paid employees of the other gender for equal work on jobs requiring equal skill, effort, and responsibility performed under similar working conditions.

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Social Security

Marketing education students must secure a social security number. Teachers should be familiar with the social security law and with the different social security programs before placing students in a training station.

Each employer is required to give the student a copy of a W-2 form which includes a statement of social security contributions deducted from their pay, as well as the amount of wages and other contributions. This is done is January and, if requested, when the student terminates employment. Receipts show the amount of wages that count for social security. For most kinds of work, wages paid in forms other than cash -- the value of meals or living quarters -- must be included. For domestic work in a private household or for farm work, only cash wages count.

Most student-workers are entitled to benefits under the provisions of the Social Security Act. Individuals not covered are government employees and employees of certain nonprofit organizations. The Social Security Act does not provide coverage for children employed by either parent if they are under 21 years of age.

Any student who is currently receiving Social Security benefits may earn only a specific amount each fiscal year. If you have such a student, check with the Social Security Administration office for up-to-date information on limitations.

Worker's Compensation Insurance

Working conditions should be carefully evaluated in determining the suitability of training stations. The school has some responsibility for the health, safety, and job satisfaction of students in the marketing education program. Placement of students where the environment is unpleasant or not in keeping with generally accepted standards for the occupation causes dissatisfaction on the part of students, parents, and other who expect the marketing education program to maintain high standards. Some working conditions to consider in selected suitable employment sites are:

1. Convenience of location with respect to the student being able to get safely to work from school and home within a reasonable period of time.
2. Healthful and safe working conditions.
3. Hours of work which allow the student sufficient time to keep up with school work, participate in recreation, and get adequate rest.
4. Adequate equipment and facilities to practice the occupation for which training is planned.
5. Compliance with local, state and federal labor regulations regarding wages, hours, working conditions, insurance, and hazardous occupations.

One of the foremost concerns of an employer is liability for accidents involving employment of marketing education students. The school administration must also be aware of exactly what it's liability is for the programs it offers.

Nearly all employment in Missouri is covered by worker's compensation; there are some exemptions from the law. However, when an employer is required by law to provide compensation, and providing that the accident did occur on the job, this insurance covers the employer's full liability to employees for medical and hospital expenses as well as partial liability for loss of employee income. Worker's compensation is furnished and paid for by the employer, no deductions are withheld from the employee's wages for this coverage.

The teacher may choose to be cautious about placing students with employers who may not carry workmen's compensation insurance or other comparable coverage for injuries incurred while on the job. The student is a bona fide employee and therefore should be placed in firms where adequate employee accident insurance is provided by the employer. Private insurance companies may not deny insurance coverage to an employer because they employ workers 16-18 years of age. If, however, the employer has a record of claims they may have to pay an assigned risk premium. These assigned risk premiums are not related to the age of the company's employees, but rather past history of injury claims.

Unemployment Tax

Unlike workmen's compensation insurance, marketing education students are not covered under the provisions of the Missouri Unemployment Tax law. Employers are not required to pay Unemployment Tax during periods in which students are enrolled in the program (i.e. from the first day of the school year to the last day of the school year). Employers are required to file Unemployment Tax for periods when the student is not enrolled in the program, such as during summer months. In like manner, students are not eligible to claim benefits while enrolled in the program.

Targeted Jobs Tax Credit (TJTC)

This program is available to employers who hire targeted groups who tend to have a high unemployment rate or other special needs. The student-employee must be certified as economically disadvantaged and/or handicapped. The advantage to the employer is that they receive a tax credit equal to 40% of the first year wages, up to $6000, per certified employee. Tax credits are granted only for employees who are employed for at least 90 days or for 120 clock hours. Many chain organizations automatically pre-screen all applicants to determine certification status.

Certification for student workers is handled as follows:

1. The teacher provides the students with an income determination form and simplified instructions for completion by the parent. (See appendix 10A). The teacher should fill out the street address, city, and zip code for the local Employment Security office on the determination form.

2. The parent completes the form and sends it to the designated address for the local Employment Security office.

3. The State Employment Security makes the economic determination by validating the form based on the information submitted by the parent and notifies the teacher of the student's eligibility status. (See appendix 10B).

4. The teacher completes the certification Form 6199 and sends it to the employer. The teacher must maintain a record of the completed Form 6199. (See appendix 10C).

5. If the student begins work before the teacher completes the certification Form 6199, a copy of the employer's written request for TJTC must be kept on file by the school and the employer. This request must be dated PRIOR TO the student's first day of work.

The teacher's reporting system is to:

Send a letter, postmarked by the last working day of the month, to:

TJTC Coordinator
Missouri Division of Employment Security
421 East Dunklin
Jefferson City, MO 65101

This letter must include the following information:

1. Name and address of the school
2. Teacher's name
3. Students' names and social security numbers
4. Students' places of employment

This monthly reporting procedure will allow the teacher to report all students who were certified during the month on a single document.

For assistance with TJTC certification procedures, contact your local Employment Security office, listed in the telephone book under Government Offices, State.

For further information or to request publications contact:

Missouri Department of Labor and Industrial Relations
Division of Labor Standards
P.O. Box 449
Jefferson City, MO 65102
Phone: 1-800-735-2466

United States Department of Labor
Occupational Safety and Health Administration
Building 105E, 4300 Goodfellow Blvd.
St. Louis, MO 6120
Phone: (314) 263-2749

United States Department of Labor
Employment Standards Division
Wage and Hour Division
911 Walnut Street, Room 2900
Kansas City, MO 64106
Phone: (816) 426-5721

United States Department of Labor
Employment Standards Division
Wage and Hour Division
210 N. Tucker Blvd, Room 563
St. Louis, MO 63101
Phone: (314) 425-4706

SECTION 11

PROFESSIONALISM

Vocational education in general, which includes marketing education, has endured many changes in recent years and the future remains unclear. Critics of vocational education, many of whom are influential, remain vocal. Marketing educators cannot afford to let these criticisms go unchecked. They must become actively involved at all levels in finding ways to enhance the image and importance of marketing education.

The public places great trust in the professionalism of the educator. Our society believes that the quality of the services provided by teachers "directly influences the nation and its citizens." (NEA Handbook) Vocational educators are looked upon to positively influence the local community by providing trained workers and good citizens. It is expected that the professional educator will make an effort to raise professional standards, to promote a climate that encourages professional judgement and attracts persons worthy of the public trust, and will assist in preventing the practice of the profession by unqualified persons.

Meeting the Missouri marketing education certification requirements is only the first step in becoming a practicing professional. There are specialized areas of commitment that have been recognized as important to the professional marketing educator. Among these commitments are:

1. Service to the students.
2. Service to the profession.
3. Service to the community.
4. Acquisition of additional technical and professional knowledge.
5. Membership in professional organizations.

Service to Students

Marketing teachers believe that their most important function is to serve the needs of students. The Missouri State Teachers Association states that "We believe the purpose of education is to develop each individual for his/her fullest participation in the American democratic society, to pursue truth, and to seek excellence." Marketing teachers should:

1. Take responsibility for the success of their students.
2. Be an ethical role model for their students.
3. Be good classroom managers.
4. Use a variety of instructional and evaluation methods.
5. Make reasonable efforts to protect the student from conditions harmful to their safety and/or learning.
6. Foster independent action in the pursuit of learning on the part of the students.
7. Accept the responsibility to eliminate all barriers that prevent full and equal access to the marketing program.
8. Assist the students in career planning decisions.

Service to the Profession

Marketing teachers should possess an understanding of professional ethics, a desire for continued self improvement, and a willingness to participate in the planning process for their programs. Marketing teachers service to the profession is indicated by the following:

1. Self improvement by keeping current on issues related to marketing and education by reading professional journals and other publications.
2. Attending professional conferences.

3. Being receptive and adaptive to change in the practice of teaching.
4. Being involved in local and state level planning.
5. Being aware and responsive to the needs of students, parents, and administrators.
6. Realizing that their actions and relations within the community will have an impact on the program, students, and themselves.
7. Believing that academic freedom is essential to the teaching profession.

Service to the community

Marketing teachers are inherently involved in the community due to their contacts with various student employers. These contacts provide a spring board for the teacher to further devote their time and talent towards community improvement. Further, if the teacher is to relate to the students, then they must understand the community in which the student comes from. The marketing education teacher can reinforce the importance of community service through DECA related activities and as a role model.

Marketing educators not only have the right but the responsibility to be informed and active citizens in their local community. Marketing educators should impress upon the community the benefits of the free enterprise economic system as well as the benefits of free public education as integral parts of the community and cornerstones to our national strength.

Acquisition of Knowledge

The continual acquisition of knowledge is essential to effective teaching. The marketing education teacher should strive to remain current and expand their knowledge base in the marketing content area, instructional methods, and educational issues. Marketing educators must be able to locate and access information using computers and communication technology. There are several methods of acquiring additional knowledge and skill. They include:

- professional organizations
- professional meetings
- professional literature
- in-service activities
- workshops, seminars, and lectures
- classes at colleges and universities
- technical classes at community colleges
- summer internships in marketing related occupations
- work-based learning experiences

Professional Organizations

A profession is distinguished by the professional organizations which work for advancement of the profession, lead in related research, and set the minimum criteria for admission. It is recommended that the marketing teacher be a member of the following professional organizations:

AMERICAN VOCATIONAL ASSOCIATION (AVA). The AVA is the largest vocational association of educators and institutions in the country. AVA's objective is to promote programs of education through which individuals are developed to an occupational level of performance commensurate with their innate potential and societal needs. Membership in AVA permits an educator to become a member of one of the twelve divisions within the organization which are established by discipline (including one for marketing education). In addition, AVA membership is divided into five geographic regions; Missouri is in AVA Region 3. The AVA sponsors numerous and varied professional activities. A national convention is held annually in December. Other regional and special interest group meetings

BEST COPY AVAILABLE

are held to discuss issues and disseminate information. The AVA also actively represents the interests of vocational education to state and national officials who have policy making power.

American Vocation Association
1410 King Street
Alexandria, VA 22314
Phone: 1-800-826-9972
FAX: 703-683-7424

MISSOURI VOCATIONAL ASSOCIATION (MVA). The MVA is the state association affiliated with the American Vocational Association. The MVA is the state teachers organization which speaks for vocational education at the state level. The MVA sponsors an annual summer conference which provides vocational educators from across the state an opportunity to network, keep up to date on current trends and issues in their teaching specialty area, and to discuss legislative issues affecting vocational education. MVA also sponsors various activities throughout the year that promote the interests of vocational education.

Missouri Vocational Association
101 East High Street
Jefferson City, Missouri 65101
Phone: (314) 634-7366

MISSOURI MARKETING AND COOPERATIVE EDUCATION ASSOCIATION (MCEA). The MCEA is a division of the MVA which represents the leaders of marketing and cooperative education programs. The association provides members an opportunity to coordinate professional activities with MVA activities. The MCEA sponsors an annual Professional Development Conference (PDC) each February and additional meetings throughout the state. At these meetings, teachers learn from and interact with successful marketing and management executives and other business and civic leaders, learn of research findings and classroom applications, exchange innovative practices, and share ideas on all aspects of their job.

Within the MCEA organizational structure are two other professional organizations--the Missouri Marketing Education Association (MMEA) and the Missouri Cooperative Education Association (MCEA). MMEA membership is open to marketing educators and business people. MMEA focuses on the aspects of marketing education and the delivery of instruction. MCEA membership is open to teachers who are involved in cooperative education and other interested individuals interested in promoting these programs.

Missouri Marketing and Cooperative Education
P. O. Box 480
Jefferson City, MO 65102
Phone: (314) 751-4367

MARKETING EDUCATION ASSOCIATION (MEA). The MEA is the national organization for marketing educators. Through active executive and standing committees, MEA provides leadership at conferences, promotional materials, and communications with Congress and other agencies whose decisions affect marketing education programs. At the annual Marketing Education Conclave each June, the MEA sponsors professional development workshops, a President's Institute, a social event for networking, and introduction of the newest materials and ideas for marketing educators. State and regional activities are also sponsored by the MEA.

Marketing Education Association
1375 King Avenue, Suite 1-A
P.O. Box 12208
Columbus, OH 43212-0208
Phone: 1-800-448-0398

Other organizations of interest to marketing educators include:

AMERICAN MARKETING ASSOCIATION
250 South Wacker Drive
Chicago, IL 60606
Phone: (312) 648-0536
FAX: (312) 993-7542

SALES & MARKETING EXECUTIVES OF METROPOLITAN ST. LOUIS
15 North Gore
St. Louis, MO 63199
Phone: (314) 968-1399

AMERICAN FEDERATION OF TEACHERS
Midwest Region
5001 College Boulevard
Kansas City, MO 66024
Phone: (816) 491-1835

MISSOURI NATIONAL EDUCATION ASSOCIATION
1810 East Elm
Jefferrson City, MO 65101
Phone: (314) 634-3202

MISSOURI STATE TEACHERS ASSOCIATION
407 S. 6th Street
Columbia, MO 65201
Phone: (314) 442-3127

LOCAL CHAMBER OF COMMERCE

LOCAL SERVICE, CIVIC, AND FRATERNAL ORGANIZATIONS

Appendix 1A

Generic Mission Statement

MARKETING EDUCATION PROGRAM MISSION STATEMENT
(INSERT SCHOOL NAME)

It is our belief that the marketing education program at (insert school name) is an integral part of our total school curriculum accessible to all. The program includes a competency-based marketing curriculum designed to develop marketing and economic competencies that are needed to prepare for and secure employment and advancement in marketing occupations, or in those occupations that require marketing skills.

It is also our belief that the competencies developed through participation in the marketing education program can also serve as the groundwork for those students who wish to move on to postsecondary education in the areas of marketing and management or a closely related field.

We believe that the curriculum should reflect the current demands of the business world and that paramount to this is the involvement of marketing and business professionals, in an advisory capacity, in the total planning and development of the program and its' curriculum.

It is also our belief that a variety of instructional methods must be utilized to deliver instruction covering basic and social skills, career competency development, operational management and entrepreneurial development. One of the most important instructional tools is the Cooperative Education (Internship) component, whereby students are permitted to earn credit in approved businesses under the supervision of the marketing education teacher-coordinator. It is also our belief that the DECA program of activities also provides a useful array of learning experiences, particularly in the areas of marketing competencies, social skills and leadership development, thereby making it an integral part of the total marketing education program.

Finally, it is our belief that in order for the marketing education program to function in an appropriate and successful manner, the marketing educator must possess training in the field of marketing education and must also possess recent and verifiable experience in a marketing or marketing related occupation.

Appendix 2A

Missouri Certification Standards for Marketing Education Teachers and Coordinators

September 1, 1988

MISSOURI CERTIFICATION STANDARDS FOR MARKETING EDUCATION TEACHERS AND COORDINATORS

I. The Certification requirements for all vocation instructors, as provided in the State Plan, must be met by Marketing Education teachers and coordinators.

II. Requirements for Five-Year Certification.

  A. Baccalaureate Degree.

  B. Two years or 4,000 hours of approved occupational experience is required. Approval is determined by the nature or level of employment in marketing occupations.

  C. Twenty-five (25) semester hours of approved subject matter course work.

    1. Fifteen (15) semester hours must be in Marketing courses such as Merchandising, Retailing, Advertising, Salesmanship, Sales Promotion, Market Research, et cetera.

    2. Ten (10) semester hours may be in excess in the above subject matter category or in general business, to include two (2) semester hours of Economics and three (3) semester hours of Management or Business Administration.

  D. Twenty-four (24) semester hours of approved professional education courses which must include:

    1. Eight (8) semester hours of vocational education course work. Specifically, courses must include the following:

      a. Coordination Techniques

      b. Methods of Teaching Marketing Education

      c. Curriculum for Marketing Education

      d. Additional course work in vocation education for the eight (8) hour total. Courses might include Philosophy of Vocational Education, Vocational Guidance, Occupational Analysis, Vocational Youth Organizations, Adult Programs in Vocational Education.

    2. The remaining semester hours may include professional education courses such as Teaching Methods, Educational Psychology, Principles of Teaching, et cetera, to include at least six (6) semester hours of student teaching.

III. Requirements for Two-Year Certification.

  A. Baccalaureate Degree.

  B. Two years or 4,000 hours of approved occupational experience is required. Approval is determined by the nature or level of employment in Marketing occupations.

  C. Subject Matter Course Work.

1. Eight (8) semester hours of approved subject matter course work in Marketing.

2. Five (5) semester hours of approved subject matter course work in general business, economics, accounting or business administration. An excess of the eight hour minimum above may be included in this category.

D. Professional Education.

1. Twelve (12) semester hours of professional education course work with a minimum of four (4) semester hours in vocational education which includes one course in Coordination Techniques and one in either Methods or Curriculum for Marketing Education and at least six (6) semester hours of student teaching.

IV. Requirements for Five-Year Vocational Teaching Certificate Renewal.

A. Attendance of each annual vocational state conference (MVA) during the five-year period.

B. Completion of two college credit courses contributing specifically to the certification speciality.

C. Substitutions to above requirements may be made as follows:

1. A workshop or institute of fifteen (15) or more clock hours or one hundred twenty (120) clock hours of appropriate occupational experience may be substituted for attending a conference. No more than two conference requirements may be satisfied through substitution.

2. A workshop or institute of fifteen (15) or more clock hours or one hundred twenty (120) clock hours of appropriate occupational experience may substitute for each of the two college courses.

D. Evidence of completed requirements must be supplied by the teacher-coordinator to the Department of Elementary and Secondary Education with requests for certificate renewal.

V. Requirements for Two-Year Temporary Certificate Renewal

Renewal of temporary certificates is based upon the following requirements:

A. Completion of a portion of the outstanding deficiencies for a 5-year certificate.

B. Attendance at the MVA summer conferences and department sponsored inservice workshops.

Appendix 2B

Missouri Certification Standards for Postsecondary Marketing Education Faculty

MISSOURI CERTIFICATION STANDARDS FOR POSTSECONDARY MARKETING EDUCATION FACULTY

I. Requirements for Five-Year Certification.

  A. Baccalaureate Degree.

  B. Two years or 4,000 hours of approved occupational experience is required. Approval is determined by the nature or level of employment in marketing occupations.

  C. Twenty-five (25) semester hours of subject matter course work appropriate for the instructional area.

  D. Eight semester hours in vocation education, which must include:

    1. Method of Teaching Marketing Education

    2. Curriculum for Marketing Education

    3. Coordination Techniques if the faculty member is to have responsibility for internships.

    4. Additional course work in vocation education for the eight (8) hour total. Courses might include Philosophy of Vocational Education, Vocational Guidance, Occupational Analysis, Adult Programs in Vocational Education.

II. Requirements for Two-Year Certificate.

  A. Baccalaureate Degree.

  B. Two years or 4,000 hours of approved occupational experience is required. Approval is determined by the nature or level of employment in marketing occupations.

  C. Fifteen (15) semester hours of subject matter course work appropriate for the instructional area.

III. Requirement for Certification Renewal.

  Five-Year Certificates

  A. Attendance of each annual vocational state conference (MVA) during the five-year period.

  B. Completion of two college credit courses contributing specifically to the certification specialty.

  C. Substitutions to above requirements may be made as follows:

    1. A workshop or institute of fifteen (15) or more clock hours or one hundred twenty (120) clock hours of appropriate occupational experience may be substituted for attending a conference. No more than two conference requirements may be satisfied through substitution.

2. A workshop or institute of fifteen (15) or more clock hours or one hundred twenty (120) clock hours of appropriate occupational experience may substitute for each of the two college courses.

Two-Year Certificates

A. Completion of at least three semester hours of outstanding deficiencies for a five-year certificate.

B. Attendance at each annual vocation conference (MVA) during the two year period.

C. Substitution for one of the conferences in the above requirement may be made as follows:

A workshop or institute of fifteen (15) or more clock hours or one hundred twenty (120) clock hours of appropriate occupational experience may substitute for one conference. No more than one conference requirement may be satisfied through substitution.

Evidence of completed requirements must be supplied by the teacher-coordinator to the Department of Elementary and Secondary Education with requests for certificate renewal. No more than two renewals are available for two-year certificates.

Appendix 2C

Application for a Missouri Vocational Certificate

MISSOURI DEPARTMENT OF ELEMENTARY AND SECONDARY EDUCATION
TEACHER EDUCATION AND CERTIFICATION

P.O. BOX 480
JEFFERSON CITY, MO 65102-0480

APPLICATION FOR A MISSOURI VOCATIONAL CERTIFICATE

CTION A. TO BE COMPLETED BY APPLICANT

I. VITAL INFORMATION

OFFICE USE ONLY

Date received ____________

TR _____

Approved by: ____________

Type of Certif. ____________

1. ___ ___ / ___ ___ / ___ ___ ___
SOCIAL SECURITY NUMBER

2. ______________________
CURRENT NAME (LAST, FIRST, MI)

3. ______________________
ADDRESS

4. ______________________ ____
CITY STATE

5. ______ - ____
ZIP CODE

6. ______
BIRTHDATE

7. FEMALE ☐ MALE ☐

II. PURPOSE OF APPLICATION: THIS APPLICATION MAY BE USED FOR ONLY ONE AREA OF CERTIFICATION. CHECK ONE BOX FOR VOCATIONAL AREA AND ONE BOX FOR TYPE OF SERVICE POSITION.

1. VOCATIONAL AREA
- ☐ Agriculture
- ☐ Business
- ☐ Home Economics
- ☐ Health Occupations
- ☐ Marketing & Cooperative
- ☐ Trade & Industrial
- ☐ Guidance
- ☐ Special Needs

2. TYPE OF SERVICE POSITION
- ☐ Teacher - Subject Area ____________
- ☐ Counselor
- ☐ Job Placement Coordinator
- ☐ Director
- ☐ Adult Supervision
- ☐ Other ____________

III. A. EDUCATIONAL DATA: List all high schools, colleges and universities, in order of attendance, at which courses were completed. The listing must include ALL degrees.

OFFICE USE ONLY	NAME OF HIGH SCHOOL, COLLEGE OR UNIVERSITY	STATE	DEGREE	YEAR	MAJOR

Official Transcripts from each institution listed must be submitted in order for application to be complete.

B. EMPLOYMENT EXPERIENCE: List all employment experience other than teaching or counseling that has contributed to your competency in the occupation for which you propose to qualify. (Include self-employment if applicable.) If employment was part-time, indicate number of hours per week. (All employment must be within last ten years.)

EMPLOYER	ADDRESS	TYPE OF WORK	FULL OR PART-TIME	EMPLOYMENT DATES MO/YR
				-
				-
				-
				-

ify that the information in this application is accurate and complete to the best of my knowledge. I understand that any srepresentation of facts may result in the denial of the certificate.

NATURE OF APPLICANT	DATE	TELEPHONE NUMBER (HOME)

500-0609 (7-93)

PHOTOCOPIES OF THIS APPLICATION CANNOT BE ACCEPTED

IV. Teaching Experience

List in order of employment the most recent teaching experience up to 10 years.

SCHOOL OR SCHOOL DISTRICT	CITY	STATE	EMPLOYMENT DATES

ECTION B. TO BE COMPLETED BY EMPLOYING SCHOOL DISTRICT

I. List subject and grade level of certificate requested.

1. ______________________ SUBJECT ______________ GRADE LEVEL

2. ______________________ SUBJECT ______________ GRADE LEVEL

II. I hereby affirm that ______________________________ will be employed by this school district and used in the position requiring the certificate listed above for the 19 _____ to 19 _____ school year.

JOINTLY REQUEST WITH THE ABOVE APPLICANT THAT THE VOCATIONAL CERTIFICATE REQUESTED BE ISSUED.

IGNATURE OF DESIGNATED SCHOOL OFFICIAL	NAME OF SCHOOL DISTRICT		
AME OF DESIGNATED SCHOOL OFFICIAL	ADDRESS		
OSITION HELD	CITY	STATE	ZIP CODE

MAIL TO ▶

COORDINATOR OF VOCATIONAL EDUCATION
P.O. BOX 480
JEFFERSON CITY, MO 65102-0480

FFICE USE ONLY

	CLASSIFICTION TYPE	STEP	EFFECTIVE DATE	CODE
1	☐☐	☐☐☐	☐☐☐☐☐☐	0 0 ☐
2	☐☐	☐☐☐	☐☐☐☐☐☐	0 0 ☐
3	☐☐	☐☐☐	☐☐☐☐☐☐	0 0 ☐

	CERTIFICATION ACTION	LVL	SUBJECT	CLS	EFF DATE	RI	AUTH CODE
1	☐	☐☐	0 0 0 0 ☐☐	☐☐	☐☐☐☐☐☐	☐	0 0 ☐
2	☐	☐☐	0 0 0 0 ☐☐	☐☐	☐☐☐☐☐☐	☐	0 0 ☐
3	☐	☐☐	0 0 0 0 ☐☐	☐☐	☐☐☐☐☐☐	☐	0 0 ☐
4	☐	☐☐	0 0 0 0 ☐☐	☐☐	☐☐☐☐☐☐	☐	0 0 ☐
5	☐	☐☐	0 0 0 0 ☐☐	☐☐	☐☐☐☐☐☐	☐	0 0 ☐
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7	☐	☐☐	0 0 0 0 ☐☐	☐☐	☐☐☐☐☐☐	☐	0 0 ☐

500-0609 (9-92)

Appendix 3A

Student Interview Worksheet

Interview Worksheet

Prepared by____

Interviewing____

Date_________________________ for the school term of 19___ - ___

Why are you applying for the marketing program?______________________________

With whom do you live?______________________________

What previous work experience have you had?______________________________

Where are you working now?______________________________

What transportation will you use in place of the marketing education program?____________________

Do you speak any language other than English?______________________________

Do you plan to go to college?______________________________

Do you plan to enter the military?______________________________

What career plans do you have?______________________________

Tell me about your school attendance record.______________________________

Tell me about your discipline record.______________________________

Tell me about your general health.______________________________

Tell me about your hobbies.______________________________

What type of employment would you like to have?______________________________

What do you know about the marketing education program rules and regulations/expectations?__________

What do you know about DECA?______________________________

Are you willing to join DECA and pay $__________dues annually if selected for the marketing education program?______________________________

What type of books have you read in the last year?______________________________

Sell me something______________________________

Appendix 3B

Follow-Up of Former Students

FOLLOW-UP OF FORMER STUDENTS

1. Name____ Year Graduated________

   Address____

2. What is you current employment status?

   Employed full-time_____ or part-time______ or unemployed______

   Current job title__________________________ Employer____________________

3. Did you continue your education? Yes_____ No _____. If yes, answer the following:

Type of School	Currently Enrolled	Completed Program	Major Field of Study
Community College			
Technical School			
Four-year College			

4. Why did you continue your education? (Check all that apply.)

   Preparation for job______

   Upgrading in present job______

   Maintaining competency for present job______

   No occupational objective_____

   Other reason (specify)____

5. List all jobs held since graduation from high school.

Dates	Job Title	Employer	Rate of Pay

Appendix 3C

Employer Survey

EMPLOYER SURVEY

Telephone________________________________ Date________________________

1. Company name____

2. Company address____

3. Number of workers by job titles and expected turnover:

Job Title	No. Employed Full-time	No. Employed Part-Time	Percent of Expected Annual Replacement (full-time)	No. of New Workers Needed 19__	No. of New Workers Needed 19__

4. If you have seasonal demand for labor, please indicate job titles and the number needed in a high demand time.

Job Title	Number of Extra Employees Needed	Months

5. Is your business available as a training station for occupational experience programs?

_______ Now being used. _______ Need more information.

_______ Interested in possibilities. _______ Not interested.

Appendix 3D

DESE Guide

DEPARTMENT OF ELEMENTARY AND SECONDARY EDUCATION
Division of Vocational and Adult Education
P.O. Box 480
Jefferson City, Missouri 65102

GUIDE FOR SUBMITTING APPLICATIONS FOR EXPANDING/NEW REGULAR VOCATIONAL EDUCATION PROGRAMS

The following outline constitutes the minimum information necessary to review the appropriateness of application for expanding/new regular full-time preparatory vocational education programs. Prepare and submit a separate proposal for each program to the Assistant Commissioner of Division of Vocational and Adult Education on or before March 1. The local education agency (LEA) will be notified concerning the approval or disapproval of each program application.

I. GENERAL INFORMATION

A. Identify the program by U.S. Department of Education CIP code number and program title. (Postsecondary institutions - state precise name of major or specialization, and degree or certificate, if any, to be awarded upon successful completion of the program.)

B. Indicate how the need for the program was determined - employment opportunities, current and projected trends, on the advice of administration or an advisory committee, etc. If applicable, describe the LEA's cooperation with the JTPA administrative entity in the development of the program application.

C. Provide the names of program advisory committee members and their occupations. To what extent has the proposal been reviewed by the advisory committee? If applicable, what is the nature of outside reviewers' appraisal?

D. What department or other unit will administer the program? How will program supervision be provided - by whom, frequency of supervisory visits, how much time will be required to supervise the program, etc.?

E. Identify the building which is to house the program. What is its location in the LEA? Describe the space to be utilized for the program.

F. State the relationship of the proposed program to present offerings and to long-range plans of the LEA.

G. What is the proposed date for initiating the program.

II. INSTRUCTION INFORMATION

A. State the program objectives in measurable terms.

B. Provide a topical outline of major units or divisions in the vocational program/courses(s).

C. List instructional materials, major texts and references to be used.

D. Describe standards of performance or level of proficiency expected at program completion. Include a listing of program/course competencies/student learner outcomes.

III. STUDENT INFORMATION

A. Describe how students will be selected for program participation. What is the anticipated number of students to be enrolled in the program?

B. Describe the educational guidance and counseling services to be provided.

C. Describe the planned student placement procedures that will be provided for program completers.

D. Describe the planned student follow-up procedures.

E. Explain the student participation in vocational student organizations sponsored by the Division of Vocational and Adult Education.

F. Describe how the program is to be made accessible to all special populations (single parents, displaced homemakers, nontraditional, disadvantaged, handicapped, etc.).

IV. BUDGET

A. Provide anticipated salary expenditure for the program.

B. List major equipment items currently available for the program.

C. Itemize proposed equipment, teaching aids, and supply expenditures for the program.

D. Outline long-range plans for major equipment item purchases.

V. EVALUATION

A. Identify evaluation instrument(s) to be used in evaluating the effectiveness of the program.

B. Explain the procedures and/or methods of evaluation to be used in determining the results. Relate the results to the program objectives.

C. Indicate how the results of the evaluation are to be utilized.

Individual applications for adult supplemental courses (500 hours of instruction or less) may be submitted as need arises. Please contact the appropriate Department vocational education program director for information concerning the application/approval process for adult supplemental courses.

Appendix 4A

Learner Outcomes and Core Competencies Fundamentals of Marketing

FUNDAMENTALS OF MARKETING

EXPECTED STUDENT LEARNER OUTCOMES BASED ON THE CORE CURRICULUM FOR MARKETING EDUCATION

Upon completion of the course Fundamentals of Marketing, the student will be able to:

Communications in Marketing

use oral communications in marketing
use written communications in marketing

Economic Concepts

understand economics and economic activities
understand the relationship between supply and demand
understand profits
identify Gross National Product
understand the private enterprise system

Employment and Advancement

identify a marketing occupational objective
complete a marketing employment interview
secure a marketing position

Human Relations in Marketing

develop effective personal human relations skills for marketing
understand human relations in a marketing enterprise

Marketing Operations

perform basic mathematical computations in marketing
calculate prices of products or services
handle payments for purchases of products or services
understand inventory control
operate a check-out area

Marketing Planning

plan for product and services in the marketplace
develop specific products and/or services for specific markets
understand the marketing cycle of a product

Advertising and Sales Promotion

utilize visual merchandising in the promotion mix
analyze advertising media
develop promotional activities in marketing

Selling

demonstrate the steps in a sales transaction
use product or service knowledge to enhance sales success
utilize specialized selling techniques
identify various types of selling

Marketing Concepts

identify the importance of marketing
identify markets for a product and/or service
classify channels of distribution

FUNDAMENTALS OF MARKETING (Revised, 1990)
CORE COMPETENCIES

A. COMMUNICATIONS IN MARKETING

A004	Speak in a business like manner
A005	Use proper listening skills
A006	Use the telephone in a business like manner
A007	Use non-verbal communication to help convey feelings
A008	Read and understand written communications
A009	Complete letters, forms, reports, and memorandums
A010	Describe the importance of reading current business news media
A011	Describe the communications process

B. ECONOMIC CONCEPTS

B003	Recognize that economic goods are the products and services offered to meet consumer needs and wants
B004	Define economics as a process
B005	Identify economic activities
B006	Explain the importance of understanding economics
B007	Identify the major types of economic resources
B008	Identify examples of economic resources according to major type
B009	Explain the meaning of private free enterprise
B010	Describe the different types of business ownership
B011	Compare and contrast the characteristics and values of three major economic systems
B013	Define profit
B014	Identify elements that need to be accounted for before a profit can be made
B015	Explain why profit is an essential part of the private free enterprise system
B016	Define supply and demand
B017	Distinguish between buyer's and seller's markets
B018	Describe the influences and interactions of supply and demand
B019	Identify that the market price of a product is based on what a consumer is willing to give and what a seller is willing to take
B020	Identify the effects of competition on buyers and sellers
B021	Explain why competition is important to the successful functioning of a private free enterprise system
B031	Define Gross National Product
B032	Identify components of GNP calculations
B033	Explain why the U.S. GNP has continued to grow

C. EMPLOYMENT AND ADVANCEMENT

C001	Identify personal occupational requirements
C002	Describe entry-level marketing jobs available in most communities
C003	Identify possible advancement patterns
C004	Identify a tentative marketing occupational interest
C005	Develop a confident attitude toward participating in an employment interview
C006	Meet the standards of appearance and behavior required for the interview
C007	Complete a personal resume and letter of application
C008	Complete employment application forms for marketing employment
C009	Recognize the purposes and types of employment tests and general guidelines for taking them

C010 Complete a personal interview and follow-up
C011 Explain the importance of rules and regulations in a business
C012 Describe desirable work habits
C013 Explain gross pay and net pay
C014 Identify ways of integrating school and work experiences together

D. HUMAN RELATIONS IN MARKETING

D001 Define human relations
D002 Identify human relationships in marketing businesses
D003 Identify the importance of self-understanding in establishing ffective human relationships
D004 Analyze personal interests, aptitudes, traits, abilities, and attitudes
D005 Identify personal strengths and weaknesses
D006 Describe the importance of a positive self-image
D007 Identify sources for self-understanding
D008 Develop a plan of short and long-term goals
D009 Develop professional relationships with customers, co-workers, supervisors, and managers

E. MARKETING OPERATIONS

E001 Perform addition and subtraction applications in marketing
E002 Perform multiplication and division applications in marketing
E003 Perform fraction and percentage applications in marketing
E004 Calculate correct prices of products or services and total amounts of purchases
E005 Handle various types of payment for purchases
E006 Handle returns for exchange, cash refunds, or charge credit
E007 Handle COD and layaway sales transactions
E008 Explain the importance of inventory control
E009 Explain the term perpetual inventory
E010 Explain the procedures of a physical inventory
E011 Explain the importance of pricing
E012 Define the terminology used in pricing
E013 Calculate mark-up and mark-downs
E014 Arrange currency and coin in cash drawer
E015 Maintain proper amount of cash in appropriate denominations in cash drawer
E016 Balance cash drawer against cash register reading
E017 Handle cash transactions including change making activities
E018 Use sales sheets in reporting daily sales
E019 Maintain records of cash received and bank deposits
E020 Identify importance of preventing stock shrinkage

F. MARKET PLANNING

F004 Explain the role that product/service planning activities play in a company's success in the marketplace
F005 Identify factors that influence product/service planning
F006 Identify the methods of gathering primary marketing data
F007 Apply one or more of the methods to gather primary data
F008 Explain the difference between the total market approach and the segmentation approach to product planning
F009 Cite examples of specific products/services and their target markets
F010 Identify the functions of packaging to meet the needs of specific marketing

F011 Define product line and product mix
F012 Identify the stages of the product life cycle
F013 Explain the steps in product planning

H. ADVERTISING AND SALES PROMOTION

H001 Identify the major advertising media used to promote sales
H002 Identify the basic types of displays used to promote sales
H003 Identify the special promotion activities used to promote sales
H004 Identify how sales promotion benefits the marketing business, employee, and consumer
H005 Identify the major elements of a print or broadcast advertisement
H008 Compare current promotional material sent out to consumers by a business and its competitors (ex. catalogs, manufacturers' brochures, etc.)
H009 Identify the costs of various advertising media
H010 Identify the importance of visual merchandising as it applies to a business image
H011 Select appropriate, seasonal, and timely display merchandise
H012 Identify the basic elements of display arrangement
H013 Plan location of displays
H014 Analyze print and broadcast advertisements

I. SELLING

I001 Identify how to analyze customer needs and wants
I002 Identify how to determine the buying motives of customers and then appeal to them
I003 Approach the customer, determine needs, and begin the sale
I004 Present the features and benefits of a product or service
I005 Overcome customer's objections and excuses
I006 Close the sale
I007 Follow-up to service the sale
I008 Identify sources of product or service knowledge
I009 Use information on tags, labels, stamps, wrappers, etc. to help the customer buy intelligently
I010 Convert product or service knowledge into selling points
I011 Compare goods or services favorably with competing products or services
I012 Suggest advertised product or services needed from one's own company that might satisfy customer's needs
I013 Coordinate products or services with related items in an attempt to increase the amount of the sale
I014 Suggest larger quantities, higher priced goods, and additional goods in an effort to increase the average sale
I015 Identify the various types of selling, besides retaining, that takes place in marketing

J. MARKETING CONCEPTS

J001 Define marketing
J002 Explain the importance of marketing in our economy
J003 Define marketing functions
J004 Explain the functions involved in marketing products and services
J005 Define the meaning of a market for a product
J006 Describe how a market for a product can be identified
J007 Identify demographic characteristics that would compose market segments for particular products
J008 Define channel of distribution
J009 Describe two basic types of distribution
J010 Describe the function performed by channel intermediaries
J011 Identify factors that influence the length/width of a channel
J012 Explain the marketing concept
J013 Define marketing mix

Appendix 4B

Learner Outcomes and Core Competencies Advanced Marketing

ADVANCED MARKETING

EXPECTED STUDENT LEARNER OUTCOMES BASED ON THE CORE CURRICULUM FOR MARKETING EDUCATION

Upon completion of the course Advanced Marketing, the student will be able to:

Communications in Marketing

train employees
facilitate communications between employees and management
interpret marketing information

Economic Concepts

understand government regulations in marketing enterprises
identify labor and management relations
describe the importance of international marketing
identify business risks in the marketplace

Employment and Advancement

apply marketing management abilities
secure advanced marketing employment

Human Relations in Marketing

motivate marketing employees
participate in professional marketing related activities
identify the ethical and social reponsibilities of marketing

Marketing Operations

regulate stock
process purchase/payment forms and records
understand financial statements

Market Planning

conduct marketing research
examine the development of new products
establish pricing policies
determine stock/sales relationships

Advertising and Sales Promotion

plan promotional activities
conduct promotional activities
manage promotional activities
evaluate promotional activities

Selling

utilize organizational skills in professional selling
apply professional selling techniques

Market Concepts

identify marketing strategies
analyze the marketing mix

ADVANCED MARKETING (Revised, 1990)
CORE COMPETENCIES

A. COMMUNICATIONS IN MARKETING

A001	Teach individual employees to perform job duties
A002	Give oral presentations to groups of marketing personnel
A003	Interpret management policies to employees
A004	Interpret employee problems to management
A005	Interpret progress of departments, systems, or functions within the business to management
A006	Compose business letters, reports, and memorandums
A007	Read a variety of business communications and determine the relevant information
A008	Communicate orally or in writing the important information gained from reading and research
A009	Interpret tables, graphs, and charts in order to gain marketing information relevant to a business

B. ECONOMIC CONCEPTS

B008	Identify reasons for government regulation of business activities
B009	Describe how government regulates business activities
B010	Describe the types and levels of union organization
B011	Identify the issues most commonly discussed during labor-management negotiations
B012	Explain the effects of unionism on labor and management
B013	Define international trade
B014	Explain why nations engage in international trade
B015	Describe how international trade affects the economic interdependence of nations
B016	Explain the meaning of business risks
B017	Identify types of risks that businesses encounter
B018	Explain how businesses deal with the various types of risks

C. EMPLOYMENT AND ADVANCEMENT

C001	Identify qualities necessary for management/entrepreneurship
C002	Compare personal qualities with those needed for management/entrepreneurship
C003	Identify educational resources available within the community which develop career advancement opportunities
C004	Locate job prospects
C005	Describe the process for obtaining full-time employment in marketing
C006	Prepare a resume

D. HUMAN RELATIONS IN MARKETING

D001	Explain theories of employee motivation
D002	Identify ways to maintain a pleasant working environment
D003	Describe the importance of recognizing the accomplishments of others
D004	Explain the importance of professional marketing organizations and cite examples
D005	Explain the importance of trade associations in specific areas of marketing
D006	Identify and explain the importance of participating in community affairs
D007	Describe the social obligation of marketing
D008	Describe ethical behavior in marketing

E. MARKETING OPERATIONS

E004	Authorize checks according to the firm's policy
E005	Calculate stock turnover
E006	Maintain stock control records
E007	Determine relationships between stock and sales
E008	Complete purchase orders
E009	Complete invoices
E013	Interpret breakeven points
E014	Interpret stock turnover in relation to department or company operating profits
E015	Interpret financial statements
E016	Complete financial statements (i.e. balance sheet, income statement)
E017	Compare ways to ship merchandise in terms of cost and suitability

F. MARKET PLANNING

F001	Identify a marketing research project
F002	Develop a marketing research design
F003	Research the secondary data resources
F004	Gather primary data
F005	Apply sampling techniques to identify the sample population
F006	Prepare a research instrument
F007	Prepare a research report
F008	Present a research report
F009	Identify sources of ideas for new products
F010	Identify the methods of screening ideas for new products
F011	Identify the methods used for evaluating a new product idea
F012	Identify the forms and importance of pre-testing a product prototype
F014	Describe the stages of product development
F015	Identify the factors that affect pricing
F016	Identify the most widely adopted pricing policies
F017	Set pricing objectives for a product/service
F018	Identify the most widely used pricing strategies
F019	Plan sales
F020	Plan stock
F021	Plan reductions
F022	Plan purchases
F023	Plan markup
F024	Describe the forms of market testing

H. ADVERTISING AND SALES PROMOTION

H001	Plan and develop seasonal and storewide themes
H002	Select products for promotion that are seasonal and timely
H003	Plan advertising and displays which adhere to store promotional policies
H004	Obtain and use current product information necessary for effective and timely promotional activities
H005	Check advertising copy for omissions, additions, and corrections
H006	Check available quantities of an advertised product before a promotion breaks
H007	Select the most effective locations within the business to place displays
H008	Develop a schedule/calendar for changing major displays
H009	Allocate promotional space for an item based on its sales volume
H011	Coordinate promotional activities with local activities or seasonal events
H013	Inform personnel of the schedule of company sales promotion activities
H014	Coordinate national or chain advertising with local business promotions

H015	Define promotional mix
H016	Describe the potential elements of a promotional mix
H017	Identify the major advantages and disadvantages of different forms of product promotion
H018	Describe the most important factors that management should consider when designing a promotional mix

I. SELLING

I001	Determine the importance of making an appointment in advance and being on time
I002	Identify ways of dealing with ancillary personnel
I003	Announce the purpose for the call immediately to the prospective customer
I004	Plan in advance what section of sales territory will be covered in a given day
I005	Prepare and organize sales aids
I006	Keep customer records
I009	Set and evaluate sales goals or quotas
I014	Gain customer's attention with a strong opening remark
I015	Make a smooth, natural and interesting sales presentation
I016	Show how the product or service will satisfy the needs of the customers
I017	Plan for customers' participation

J. MARKETING CONCEPTS

J001	Define marketing strategy
J002	Identify factors that affect marketing strategies
J003	Describe a marketing strategy for a given situation
J004	Identify the elements of the marketing mix
J005	Determine a marketing mix

Appendix 4C

Learner Outcomes and Core Competencies (Supervisory) Management

(SUPERVISORY) MANAGEMENT

EXPECTED STUDENT LEARNER OUTCOMES BASED ON THE CORE CURRICULUM FOR (SUPERVISORY) MANAGEMENT

Upon completion of the course (Supervisory) Management, the student will be able to:

Functions of Management

analyze the levels and responsibilities of management

Study of Management

identify the functions of management activities
analyze the types of supervision

Planning

recognize the components of the planning process
define management by objectives

Decision Making

identify employer reward techniques
develop decision-making abilities

Controlling

compare and contrast the components of control
analyze the principles of delegation
analyze supervisory accountability

Organizing

develop organizational charts
identify specific methods of departmentalization
recognize the importance of supervisory objectives
identify the organizing functions of management

Staffing

utilize systematic employee selection processes
apply appraisal techniques and procedures
develop an appropriate training program for an organization
describe (supervisory) manager's role in staffing decisions

Directing

distinguishing between different types of authority
identify the components of delegation

Communications

analyze the components of managerial communication
apply conflict resolution approaches in given situations

Motivation

develop and evaluate a motivational program
recognize management's role in assisting employees in goal achievement
differentiate between various motivational techniques

Leadership

recognize and differentiate between various models of leadership
identify leadership styles
identify the supervisor's role in discipline of employees
identify the leadership role of management in preventive control measures

Government Regulation

identify government regulations that apply to business

Information Systems and Management

analyze data provided by basic software packages

(SUPERVISORY) MANAGEMENT (Revised, 1991)
CORE COMPETENCIES

A. FUNCTIONS OF MANAGEMENT

A001 Justify the need for management
A002 Define management, managers and supervisors
A003 Distinguish between managerial and non-managerial activities
A004 Describe the roles of a supervisory manager
A005 Differentiate between the roles and responsibilities to top executives and those of lower-level managers

B. STUDY OF MANAGEMENT

B001 Translate given management activities into defined functions
B002 Differentiate between the various types of supervision

C. PLANNING

C001 Define planning and control
C002 Identify the steps in the planning process
C003 Identify the types of plans
C004 Describe the kind of information in each type of plan
C005 Differentiate between the long-term and short-term planning
C006 Define Management by Objectives (MBO)
C007 Distinguish between the different management level's planning processes

D. DECISION MAKING

D001 Propose methods for specifying desired actions in measurable terms and follow-up
D002 Describe the types of supervisory decisions
D003 Describe the steps of general decision-making process

E. CONTROLLING

E001 Judge the adequacy of given standards for use in control
E002 Propose specific actions to correct deviations detected through control
E003 Recognize the importance of delegation
E004 Discuss the principles relevant to effective delegation
E005 Define the unity of control principle
E006 Justify the importance of accountability
E007 Define the principles of unity of command and span of control
E008 Describe the three types of authority found in organizations

F. ORGANIZING

F001 Develop an organization chart to illustrate formal relationships
F002 Identify the methods of departmentalization that apply to a specific organizing situation
F003 Analyze the importance of objectives in supervisory management
F004 Identify the fundamentals of supervisory organization
F005 Recognize the stages of organizational growth
F006 Compare and contrast the difference between line and staff

G. STAFFING

G001 Utilize a systematic approach to choose among candidates for a specific position
G002 Develop and evaluate an appraisal procedure for a simple organization
G003 Determine when training and development are needed in an organization
G004 Create a program for training individuals for future positions
G005 Describe the responsibilities for selecting, training and appraising employees
G006 Identify how to plan personnel needs and how to find employees for specific positions
G007 Orient employees and issue instructions in a manner required of the organization and personal characteristics of subordinates.
G008 Describe employee performance appraisal methods
G009 Describe the possible effects of evaluation on employee morale
G010 Define the role of supervisory management in departmental decisions involving employee wage increases, variable pay plans and supplementary benefits

H. DIRECTING

H001 Interpret the roles of different types of authority and influence in a specific management situation
H002 Identify steps for avoiding difficulties resulting from delegation

I. COMMUNICATIONS

I001 Analyze the effects of obstacles to communication in given interactions
I002 Appraise managerial communication practices
I003 Apply guidelines to improve managerial communication practices
I004 Analyze the types of supervisory communication
I005 Define the term communications
I006 Evaluate the components of the supervisory communication process model
I007 Recognize the existence of conflict and propose approaches to its resolution in specific cases

J. MOTIVATION

J001 Develop a motivational program for an organization
J002 Describe the supervisor's role in assisting employees achieve satisfaction of their needs
J003 Recognize the relationship between money, motivation and the expectancy theory
J004 Identify the types of rewards individuals seek at work
J005 Relate rewards to individual's performance and choices in specific situations
J006 Describe the effects of a "job rotation" strategy
J007 Describe the use and effects of "job enlargement"
J008 Describe the use and effects of "job enrichment"
J009 Describe the motivational effects of "participative management"
J010 Determine how to inspire self-confidence, develop individuals, and increase productivity of an organization
J011 Identify the conditions for effective team building

K. LEADERSHIP

K001 Compare and contrast the different models of leadership behavior
K002 Identify the factors in a given management situation that influence the choice of a leadership style
K003 Define McGregor's "Theories X" and "Y"
K004 Identify the advantages and disadvantages of "Theories X" and "Y"
K005 Describe how "Theory Z" can be used as a motivational tool
K006 Define discipline
K007 List the steps of progressive discipline
K008 Describe the supervisor's disciplinary role
K009 Identify how supervisory control works
K010 Describe how preventive control works
K011 Identify ways in which a supervisor may effectively function with higher level management

L. GOVERNMENT REGULATION

L001 Identify federal, state, and local government regulations with which supervisory management should be familiar

M. INFORMATION SYSTEMS AND MANAGEMENT

M001 Differentiate between data processing and management information systems
M002 Analyze the types of data and reports from basic software packages utilized by supervisory managers (i.e. word processing, database management systems, and electronic spreadsheets)

Appendix 4D

Core Competencies Entrepreneurship

ENTREPRENEURSHIP (Revised, 1987)
CORE COMPETENCIES

A. EXPLORING ENTREPRENEURSHIP

A001	Identify entrepreneur opportunities
A002	Define the different motivations (reasons) for becoming an entrepreneur
A003	Identify the advantages and disadvantages of becoming an entrepreneur
A004	Explain the risks affecting the entrepreneur
A005	Define entrepreneurship and explain its importance in the private free enterprise system
A006	Identify and explain the advantages and disadvantages of being an employee versus being an employer (entrepreneur)
A007	Analyze the decision-making process and its importance to the entrepreneur
A008	Identify and discuss the personality traits and abilities of a successful entrepreneur
A009	Interpret the meaning of achievement motivation and the importance of dependence to the entrepreneur

B. SUCCESS AND FAILURE OF ENTREPRENEURS

B001	Identify the main reasons for business failure in a private free enterprise system
B002	Identify the main factors contributing to a successful business
B003	Identify and select resources that can help entrepreneurs become competent
B004	Compare business failure rates in different industries
B005	Explain the necessity of a sound business plan to the entrepreneur
B006	Identify the steps involved in developing a business plan
B007	Explain the deferent failure rates of business due to the age of the business

C. LOCATION AND OWNERSHIP

C001	Interpret the importance of selecting the proper location for a business
C002	Identify the advantages and disadvantages of buying an existing business
C003	Identify the advantages and disadvantages of starting a new business
C004	Explain the factors to consider when selecting the city or town in which to locate
C005	Analyze the steps involved in site selection
C006	Compare the different site considerations for: a. a retail establishment b. a wholesale establishment c. a service business d. a manufacturing firm
C007	Identify resources to help the entrepreneur in site selection
C008	Compare the different types of leases
C009	Appraise the advantages and disadvantages of the four major types of ownership a. independent b. partnership c. corporation d. franchising

D. GOVERNMENT REGULATIONS

D001 Identify government regulations that affect the entrepreneur
D002 Detail the role of government regulation in a private free enterprise system
D003 Distinguish between the terms "license" and "permit"
D004 Identify agencies which licensee businesses
D005 Identify the types of federal, state and local taxes that are the responsibility of the entrepreneur
D006 Interpret the dual role of business in managing taxes
D007 Identify resources for legal advice

E. START-UP FINANCE

E001 Explain and calculate how to determine start-up cost for a business in a given situation
E002 Define fixed and variable costs
E003 Define equity financing
E004 Define debt financing
E005 Define trade credit
E006 Identify sources of financing for the entrepreneur

F. FINANCIAL MANAGEMENT

F001 Explain the importance of financial management to the entrepreneur
F002 Identify the components and explain the importance of a profit and loss statement
F003 Evaluate the importance of ratio analyses
F004 Compute break-even points
F005 Identify the components and explain the importance of a balance sheet
F006 Compare and contrast the terms "current assets" and "fixed assets"

G. CONTROL AND RISK

G001 Interpret the importance of business protection to the entrepreneur
G002 Identify management functions performed by the entrepreneur
G003 List the steps involved in making management decisions
G004 Identify the common problems encountered by the entrepreneur in the management role
G005 Define liabilities
G006 Explain the purpose of insurance
G007 Evaluate the different types of insurance the entrepreneur should consider
G008 Identify the steps involved in assessing the management capabilities of an entrepreneur

H. MANAGERIAL RESOURCES

H001 Identify and describe organizations which offer managerial assistance to entrepreneurs
H002 Cite the advantages of affiliation with civic and professional organizations
H003 Appraise the role of the SBA (Small Business Administration)

I. RECORD KEEPING

I001 Discuss the importance of accurate record keeping to the entrepreneur
I002 List the types of business records the entrepreneur needs to keep on hand
I003 Compare and contrast single-entry record keeping and double-entry record keeping
I004 Perform the steps involved in reconciling a bank statement
I005 Identify the information needed for payroll records
I006 State the purpose of:
    a. daily sales records
    b. cash summary records
    c. inventory records
    d. production records

J. MARKETING

J001 Define marketing
J002 Identify the marketing functions important to the entrepreneur
J003 Identify the elements of the marketing (mix) strategy
J004 Show how the entrepreneur can use market research before the business is opened
J005 Find sources of information for market research

K. MARKETING MANAGEMENT

K001 Identify and define the steps involved in market research
K002 Identify the steps involved in product planning
K003 Define distribution
K004 Compare and contrast the terms advertising, publicity and sales promotion
K005 Compare and contrast the major media forms used for advertising
K006 Identify the advantages and disadvantages of extending credit to customers
K007 List and explain the major types of distribution channels
K008 State what is meant by product line diversification
K009 Show the elements that affect pricing practices.

L. PERSONNEL MANAGEMENT

L001 Detail the functions of personnel management
L002 Determine the relationship between unions and the entrepreneur
L003 Explain the accepted practices for hiring, training, and dismissing of employees
L004 Identify and explain deferent methods of compensation
L005 Compare the advantages of the different forms of internal communication used by businesses
L006 Define company groups
L007 Identify different ways of locating future employees

M. COMMUNITY RELATIONS

M001 Determine the importance of community relations to the entrepreneur
M002 Identify different ways the entrepreneur can achieve community involvement
M003 Define business image
M004 Develop objectives for a community relations program

Appendix 4E

Core Competencies
Free Enterprise Economics

FREE ENTERPRISE ECONOMICS (Revised, 1987)
CORE COMPETENCIES

A. ECONOMIC SYSTEMS

A001 Define economics
A002 Define economic system
A003 Explain the concept of interdependence
A004 Identify the various types of economic resources
A005 Discuss the factors of production
A006 Compare and contrast the three basic kinds of economic systems
A007 Identify the basic economic questions
A008 Identify economic activities
A009 Explain the difference between macro and micro economics
A010 Compare and contrast consumer goods and producer goods

B. SCARCITY AND CHOICES

B001 Explain the meaning and causes of scarcity
B002 Distinguish between renewable and non-renewable resources
B003 Explain the differences between primary wants and needs and intangible wants
B004 Discuss the 'trade off' aspect of economic decision making
B005 Discuss the meaning and various types of utility

C. MEASURING ECONOMIC SYSTEMS

C001 Explain the concept of business cycle
C002 Explain the characteristics of money income and real income
C003 Differentiate between gross national product (GNP) and net national product (NNP)
C004 Calculate GNP in terms of real dollars and constant dollars
C005 Differentiate between personal income and disposable personal income
C006 Describe the elements and implications of the consumer price index

D. SUPPLY AND DEMAND

D001 Explain the law of supply and demand
D002 Explain the demand curve
D003 Explain the supply curve
D004 Explain equilibrium price
D005 Find the equilibrium price by constructing the appropriate supply and demand curves for a given situation
D006 Explain the new buyer effect
D007 Explain the income effect
D008 Describe the substitution effect
D009 Compare and contrast competing demand and complementary demand
D010 Define elasticity of demand and explain the factors which determine elasticity
D011 Compare and contrast buyers' and sellers' markets

E. PROFIT

E001 Discuss the profit motive
E002 Define profit

F. COMPETITION

F001 Define competition
F002 Distinguish between perfect and imperfect competition
F003 Discuss some restrictions which are placed on competition
F004 Distinguish between monopolies, trusts and public monopolies

G. THE ROLE OF MONEY AND BANKING

G001 Define money and describe its characteristics and functions
G002 Distinguish between currency and checks
G003 List and describe bank services
G004 Define interest in reference to banking
G005 Explain the relationship between money supply and money available for lending
G006 Explain the role of the Federal Reserve System and discuss the control tools it uses
G007 Discuss the circular flow and explain the role of money in that model

H. ROLE OF THE CONSUMER

H001 Define consumer
H002 Discuss the functions of various private and governmental agencies as they pertain to consumers
H003 Explain what is meant by "the consumer movement"

I. THE ROLE OF THE WORK FORCE

I001 Discuss various types of work
I002 Describe the types of unemployment and explain the causes of each
I003 Explain the rationale behind various laws which apply to the workforce
I004 Identify and explain the impact of federal regulations pertaining to organized labor
I005 Define organized labor and labor unions
I006 Discuss the collective bargaining process and the issues which management and labor might be forced to negotiate

J. THE ROLE OF GOVERNMENT

J001 Explain the various federal acts which regulate the work place
J002 Discuss the purpose of a wage price freeze
J003 Compare and contrast the principles of taxation
J004 Describe the regulatory role of various federal agencies and explain the laws which created them
J005 Define fiscal policy
J006 Discuss the implications of a surplus and a deficit budget
J007 Explain what is meant by the national debt

K. TYPES OF BUSINESS

K001 List and explain the functions of business
K002 Identify and discuss the nature of various types of business
K003 Define entrepreneurship
K004 Describe the role and functions of management
K005 Define various ownership forms and discuss the advantages and disadvantages of each

L. THE ROLE OF PRODUCTION

L001 Define production
L002 Explain the law of diminishing return
L003 Explain how patent and copyright laws affect production
L004 Describe mass production in terms of its various characteristics and economics of scale
L005 List and explain the production functions

M. THE ROLE OF MARKETING

M001 Define marketing and discuss the functions of marketing
M002 Compare and contrast the types of goods and services which flow through the consumer and business markets
M003 Define and discuss the "4 P's" of the marketing mix
M004 Define and describe several types of distribution channels and the functions performed by each

N. INTERNATIONAL ECONOMICS

N001 Define international finance
N002 Discuss the importance and characteristics of various methods and rates of international exchange
N003 Explain the importance of balance of trade

Appendix 4F

Competency Profile Cards

Directions: Check the appropriate box below to indicate those competencies which the student has Mastered, Not Mastered, or Not Attempted. Certain competencies have been deleted from the first profile, consequently, the numbering sequence is somewhat altered to accommodate that change.

Rating Scale: **M Mastered** -student has demonstrated appropriate level of competency
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X Not Attempted - student did not have an opportunity to master this competency

9-90

M	N	X	
			A. Communications in Marketing
☐	☐	☐	4. Speak in a business-like manner
☐	☐	☐	5. Use proper listening skills
☐	☐	☐	6. Use the telephone in a business-like manner
☐	☐	☐	7. Use non-verbal communication to help convey feelings
☐	☐	☐	8. Read and understand written communications
☐	☐	☐	9. Complete letters, forms, reports, and memorandums
☐	☐	☐	10. Describe the importance of reading current business news media
☐	☐	☐	11. Describe the communications process
☐	☐	☐	Others (specify): ____________

M	N	X	
			B. Economic Concepts
☐	☐	☐	3. Recognize that economic goods are the products and services offered to meet consumer needs and wants
☐	☐	☐	4. Define economics as a process
☐	☐	☐	5. Identify economic activities
☐	☐	☐	6. Explain the importance of understanding economics
☐	☐	☐	7. Identify the major types of economic resources
☐	☐	☐	8. Identify examples of economic resources according to major type
☐	☐	☐	9. Explain the meaning of private free enterprise
☐	☐	☐	10. Describe the different types of business ownership
☐	☐	☐	11. Compare and contrast characteristics and values of three major economic systems
☐	☐	☐	13. Define profit
☐	☐	☐	14. Identify elements that need to be accounted for before a profit can be made

M	N	X	
☐	☐	☐	15. Explain why profit is an essential part of the private free enterprise system
☐	☐	☐	16. Define supply and demand
☐	☐	☐	17. Distinguish between buyer's and seller's markets
☐	☐	☐	18. Describe the influences and interactions of supply and demand
☐	☐	☐	19. Identify that the market price of a product is based on what a consumer is willing to give and what a seller is willing to take
☐	☐	☐	20. Identify the effects of competition on buyers and sellers
☐	☐	☐	21. Explain why competition is important to the successful functioning of a private free enterprise system
☐	☐	☐	31. Define Gross National Product
☐	☐	☐	32. Identify components of GNP calculations
☐	☐	☐	33. Explain why the U.S. GNP has continued to grow
☐	☐	☐	Others (specify): ____________

M	N	X	
			C. Employment and Advancement
☐	☐	☐	1. Identify personal occupational requirements
☐	☐	☐	2. Describe entry-level marketing jobs available in most communities
☐	☐	☐	3. Identify possible advancement patterns
☐	☐	☐	4. Identify a tentative marketing occupational interest
☐	☐	☐	5. Develop a confident attitude toward participating in an employment interview
☐	☐	☐	6. Meet the standards of appearance and behavior required for the interview
☐	☐	☐	7. Complete a personal resume and letter of application
☐	☐	☐	8. Complete employment application forms for marketing employment

M	N	X	
☐	☐	☐	9. Recognize the purposes and types of employment tests and general guidelines for taking them
☐	☐	☐	10. Complete a personal interview and follow-up
☐	☐	☐	11. Explain the importance of rules and regulations in a business
☐	☐	☐	12. Describe desirable work habits
☐	☐	☐	13. Explain gross pay and net pay
☐	☐	☐	14. Identify ways of integrating school and work experiences together
☐	☐	☐	Others (specify): ____________

M	N	X	
			D. Human Relations in Marketing
☐	☐	☐	1. Define human relations
☐	☐	☐	2. Identify human relationships in marketing businesses
☐	☐	☐	3. Identify the importance of self-understanding in establishing effective human relationships
☐	☐	☐	4. Analyze personal interests, aptitudes, traits, abilities, and attitudes
☐	☐	☐	5. Identify personal strengths/weaknesses
☐	☐	☐	6. Describe the importance of a positive self-image
☐	☐	☐	7. Identify sources for self-understanding
☐	☐	☐	8. Develop a plan of short and long-term goals
☐	☐	☐	9. Develop professional relationships with customers, co-workers, supervisors, and managers.
☐	☐	☐	Others (specify): ____________

M	N	X	
			E. Marketing Operations
☐	☐	☐	1. Perform addition and subtraction applications in marketing
☐	☐	☐	2. Perform multiplication and division applications in marketing

M	N	X	
			3. Perform fraction and percentage applications in marketing
			4. Calculate correct prices of products or services and total amounts of purchases
			5. Handle various types of payment for purchases
			6. Handle returns for exchange, cash refunds, or charge credit
			7. Handle COD and layaway transactions
			8. Explain importance of inventory control
			9. Explain the term perpetual inventory
			10. Explain the procedures of a physical inventory
			11. Explain the importance of pricing
			12. Define the terminology used in pricing
			13. Calculate mark-up and mark-downs
			14. Arrange currency/coin in cash drawer
			15. Maintain proper amount of cash in appropriate denominations in cash drawer
			16. Balance cash drawer against cash register reading
			17. Handle cash transactions including change making activities
			18. Use sales sheets in reporting daily sales
			19. Maintain records of cash received and bank deposits
			20. Identify importance of preventing stock shrinkage
			Others (specify): ______________________

F. Market Planning

M	N	X	
			4. Explain the role that product/service planning activities play in a company's success in the marketplace
			5. Identify factors that influence product/service planning
			6. Identify the methods of gathering primary marketing data
			7. Apply one or more of the methods to gather primary data
			8. Explain the difference between the total market approach and the segmentation approach to product planning
			9. Cite examples of specific products/services and their target markets
			10. Identify the functions of packaging to meet the needs of specific marketing
			11. Define product line and product mix

M	N	X	
			12. Identify stages of the product life cycle
			13. Explain the steps in product planning
			Others (specify): ______________________

H. Advertising and Sales Promotion

M	N	X	
			1. Identify the major advertising media used to promote sales
			2. Identify the basic types of displays used to promote sales
			3. Identify the special promotion activities used to promote sales
			4. Identify how sales promotion benefits the marketing business, employee, and consumer
			5. Identify the major elements of a print or broadcast advertisement
			8. Compare current promotional material sent out to consumers by a business and its competitors (ex. catalogs, manufacturers' brochures, etc.)
			9. Identify the costs of various advertising media
			10. Identify the importance of visual merchandising as it applies to a business image
			11. Select appropriate, seasonal, and timely display merchandise
			12. Identify the basic elements of display arrangement
			13. Plan location of displays
			14. Analyze print and broadcast advertisements
			Others (specify): ______________________

I. Selling

M	N	X	
			1. Identify how to analyze customer needs and wants
			2. Identify how to determine the buying motives of customers and then appeal to them
			3. Approach the customer, determine needs, and begin the sale
			4. Present the features and benefits of a produce or service
			5. Overcome customer's objections and excuses
			6. Close the sale

M	N	X	
			7. Follow-up to service the sale
			8. Identify sources of product or service knowledge
			9. Use information on tags, labels, stamps, wrappers, etc. to help the customer buy intelligently
			10. Convert product or service knowledge into selling points
			11. Compare goods or services favorably with competing products or services
			12. Suggest advertised product or services from one's own company that might satisfy customer's needs
			13. Coordinate products or services with related items in an attempt to increase the amount of the sale
			14. Suggest larger quantities, higher priced goods, and additional goods in an effort to increase the average sale
			15. Identify the various types of selling, besides retailing, that takes place in marketing
			Others (specify): ______________________

J. Marketing Concepts

M	N	X	
			1. Define marketing
			2. Explain the importance of marketing in our economy
			3. Define marketing functions
			4. Explain the functions involved in marketing products and services
			5. Define the meaning of a market for a product
			6. Describe how a market for a product can be identified
			7. Identify demographic characteristics that would compose market segments for particular products
			8. Define channel of distribution
			9. Describe two basic types of distribution
			10. Describe the function performed by channel intermediaries
			11. Identify factors that influence the length/width of a channel
			12. Explain the marketing concept
			13. Define marketing mix
			Others (specify): ______________________

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1-91

A. Communications In Marketing

M	N	X	
☐	☐	☐	1. Teach individual employees to perform job duties
☐	☐	☐	2. Give oral presentations to groups of marketing personnel
☐	☐	☐	3. Interpret management policies to employees
☐	☐	☐	4. Interpret employee problems to management
☐	☐	☐	5. Interpret progress of departments, systems, or functions within the business to management
☐	☐	☐	6. Compose business letters, reports, and memorandums
☐	☐	☐	7. Read a variety of business communications and determine relevant information
☐	☐	☐	8. Communicate orally or in writing the important information gained from reading and research
☐	☐	☐	9. Interpret tables, graphs, and charts in order to gain marketing information relevant to a business
☐	☐	☐	Others (specify): ________________

B. Economic Concepts

M	N	X	
☐	☐	☐	8. Identify reasons for government regulation of business activities
☐	☐	☐	9. Describe how government regulates business activities
☐	☐	☐	10. Describe the types and levels of union organization
☐	☐	☐	11. Identify the issues most commonly discussed during labor-management negotiations
☐	☐	☐	12. Explain the effects of unionism on labor and management
☐	☐	☐	13. Define international trade
☐	☐	☐	14. Explain why nations engage in international trade
☐	☐	☐	15. Describe how international trade affects the economic interdependence of nations
☐	☐	☐	16. Explain the meaning of business risks
☐	☐	☐	17. Identify types of risks that businesses encounter
☐	☐	☐	18. Explain how businesses deal with the various types of risks
☐	☐	☐	Others (specify): ________________

C. Employment and Advancement

M	N	X	
☐	☐	☐	1. Identify qualities necessary for management/entrepreneurship
☐	☐	☐	2. Compare personal qualities with those needed for management/entrepreneurship
☐	☐	☐	3. Identify educational resources available with the community which develop career advancement opportunities
☐	☐	☐	4. Locate job prospects
☐	☐	☐	5. Describe the process for obtaining full-time employment in marketing
☐	☐	☐	6. Prepare a resume
☐	☐	☐	Others (specify): ________________

D. Human Relations In Marketing

M	N	X	
☐	☐	☐	1. Explain theories of employee motivation
☐	☐	☐	2. Identify ways to maintain a pleasant working environment
☐	☐	☐	3. Describe the importance of recognizing the accomplishments of others
☐	☐	☐	4. Explain the importance of professional marketing organizations and cite examples
☐	☐	☐	5. Explain the importance of trade associations in specific areas of marketing
☐	☐	☐	6. Identify and explain the importance of participating in community affairs
☐	☐	☐	7. Describe the social obligation of marketing
☐	☐	☐	8. Describe ethical behavior in marketing
☐	☐	☐	Others (specify): ________________

E. Marketing Operations

M	N	X	
☐	☐	☐	4. Authorize checks according to the firm's policy
☐	☐	☐	5. Calculate stock turnover
☐	☐	☐	6. Maintain stock control records
☐	☐	☐	7. Determine relationships between stock and sales
☐	☐	☐	8. Complete purchase orders
☐	☐	☐	9. Complete invoices
☐	☐	☐	13. Interpret breakeven points
☐	☐	☐	14. Interpret stock turnover in relation to department or company operating profits
☐	☐	☐	15. Interpret financial statements
☐	☐	☐	16. Complete financial statements (i.e. balance sheet, income statement)
☐	☐	☐	17. Compare ways to ship merchandise in terms of cost and suitability
☐	☐	☐	Others (specify): ________________

			F. Market Planning
			1. Identify a marketing research project
			2. Develop a marketing research design
			3. Research the secondary data resources
			4. Gather primary data
			5. Apply sampling techniques to identify the sample population
			6. Prepare a research instrument
			7. Prepare a research report
			8. Present a research report
			9. Identify sources of ideas for new products
			10. Identify the methods of screening ideas for new products
			11. Identify the methods used for evaluating a new product idea
			12. Identify the forms and importance of pre-testing a product prototype
			14. Describe the stages of product development
			15. Identify the factors that affect pricing
			16. Identify the most widely adapted pricing policies
			17. Set pricing objectives for a product/service
			18. Identify the most widely used pricing strategies
			19. Plan sales
			20. Plan stock
			21. Plan reductions
			22. Plan purchases
			23. Plan markup
			24. Describe the forms of market testing
			Others (specify): ________________

M	N	X	**H. Advertising and Sales Promotion**
			1. Plan and develop seasonal and storewide themes
			2. Select products for promotion that are seasonal and timely
			3. Plan advertising and displays which adhere to store promotional policies
			4. Obtain and use current product information necessary for effective and timely promotional activities
			5. Check advertising copy for omissions, additions, and corrections
			6. Check available quantities of an advertised product before a promotion breaks
			7. Select the most effective locations within the business to place displays
			8. Develop a schedule/calendar for changing major displays
			9. Allocate promotional space for an item based on its sales volume
			11. Coordinate promotional activities with local activities or seasonal events
			13. Inform personnel of the schedule of company sales promotion activities
			14. Coordinate national or chain advertising with local business promotions
			15. Define promotional mix
			16. Describe the potential elements of a promotional mix
			17. Identify the major advantages and disadvantages of different forms of product promotion
			18. Describe the most important factors that management should consider when designing a promotional mix
			Others (specify): ________________

M	N	X	**I. Selling**
			1. Determine the importance of making an appointment in advance and being on time
			2. Identify ways of dealing with ancillary personnel
			3. Announce the purpose for the call immediately to the prospective customer
			4. Plan in advance what section of sales territory will be covered in a given day
			5. Prepare and organize sales aids
			6. Keep customer records
			9. Set and evaluate sales goals or quotas
			14. Gain customer's attention with a strong opening remark
			15. Make a smooth, natural, and interesting sales presentation
			16. Show how the product or service will satisfy the needs of the customers
			17. Plan for customers' participation
			Others (specify): ________________

M	N	X	**J. Marketing Concepts**
			1. Define marketing strategy
			2. Identify factors that affect marketing strategies
			3. Describe marketing strategy for a given situation
			4. Identify the elements of the marketing mix
			5. Determining a marketing mix
			Others (specify): ________________

Name: ____________________ **Management** 8 44-C

Directions: Check the appropriate box below to indicate those competencies which the student has Mastered, Not Mastered, or Not Attempted. Certain competencies have been deleted from the first profile, consequently, the numbering sequence is somewhat altered to accommodate that change.

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12-92

M	N	X	**A. Functions of Management ***
☐	☐	☐	1. Justify the need for management
☐	☐	☐	2. Describe the vital requirements of an organization
☐	☐	☐	3. Decide whether a given group of people and resources constitute an organization
☐	☐	☐	4. Define management and managers
☐	☐	☐	5. Distinguish between managerial and nonmanagerial activities
☐	☐	☐	6. Recognize the extent of management specialization in a given organization
☐	☐	☐	7. Explain differences between business, government and nonprofit organizations that affect the duties of their managers
☐	☐	☐	Other (specify): ____________________

M	N	X	**B. Study of Management ***
☐	☐	☐	1. Compare the methods and aims of the classical human relations and quantitative schools of management thought
☐	☐	☐	2. Sort given management activities into defined functions
☐	☐	☐	Other (specify): ____________________

M	N	X	**C. Planning Process ***
☐	☐	☐	1. Define planning and controlling
☐	☐	☐	2. Identify the steps in the planning process
☐	☐	☐	3. Identify the types of plans
☐	☐	☐	4. Describe the kind of information in each type of plan
☐	☐	☐	Other (specify) ____________________

M	N	X	**D. Forecasting and Premising ***
☐	☐	☐	1. Identify the kind of forecast needed to establish a specific premise
☐	☐	☐	2. Determine whether a given premise is internal or external, controllable or uncontrollable and measurable
☐	☐	☐	3. Describe four areas of an organization's environment for which premises may be needed
☐	☐	☐	4. Distinguish between external premises and internal premises used for forecasting in management planning
☐	☐	☐	Other (specify): ____________________

M	N	X	**E. Planning and Decision Making ***
☐	☐	☐	1. Propose methods for specifying desired actions in measurable terms
☐	☐	☐	2. Assess the suitability of formal methods for use in specific planning and decision making applications
☐	☐	☐	Other (specify): ____________________

M	N	X	**F. Controlling Process ***
☐	☐	☐	1. Judge the adequacy of given standards for use in control
☐	☐	☐	2. Propose specific actions to correct deviations detected through control
☐	☐	☐	3. Formulate a general control program for a simple organization
☐	☐	☐	Other (specify): ____________________

M	N	X	**G. Organizing Process ***
☐	☐	☐	1. Develop an organizational chart to illustrate the formal relationships
☐	☐	☐	2. Identify methods of departmentalization that apply to a specific organizing situation
☐	☐	☐	Other (specify): ____________________

M	N	X	**H. Staffing Organizations ***
☐	☐	☐	1. Utilize a systematic approach to choose among candidates for a specific position
☐	☐	☐	2. Formulate and assess an appraisal procedure for a simple organization
☐	☐	☐	3. Determine when training and development are needed in an organization
☐	☐	☐	4. Propose a program for training managers to fit given future positions
☐	☐	☐	Other (specify): ____________________

M	N	X	**I. Directing ***
☐	☐	☐	1. Interpret the roles of different kinds of authority and influence in a specific management situation
☐	☐	☐	2. Orient employees and issue instructions in a manner required of the organization and personal characteristics of subordinates
☐	☐	☐	3. Identify steps for avoiding difficulties resulting from delegation
☐	☐	☐	4. Apply MBO to integrate directing and influencing with other management functions
☐	☐	☐	Other (specify): ____________________

M	N	X	**J. Person Groups and Organizations**
☐	☐	☐	1. Identify the kinds of rewards people seek at work
☐	☐	☐	2. Relate rewards to individuals performance and choices in specific situations
☐	☐	☐	3. Assess the probable roles of formal and informal organizations in given interactions
☐	☐	☐	4. Predict the influences of group cohesion group norms and informal leaders on individual behavior
☐	☐	☐	5. Recognize the existence of conflict and propose approaches to its resolution in specific cases
☐	☐	☐	Other (specify): ____________________

M	N	X

K. Communications

1. Analyze the effects of obstacles to communication in given interactions
2. Appraise managerial communication practices
3. Apply guidelines to improve managerial communication practices

Other (specify): ____________________

M	N	X

L. Motivation

1. Propose a practical application of each theory of motivation
2. Outline an orderly approach for developing a consistent motivational program for an organization

Other (specify): ____________________

M	N	X

M. Leadership

1. Compare and contrast a number of different models of leadership behavior
2. Apply Fiedler's contingency approach to predict the success of leadership behavior in given situations
3. Identify the factors in a given management situation that influence the choice of a leadership style

Other (specify): ____________________

M	N	X

N. Social Concerns and Management Decisions

1. Analyze the effects of different sources of social concern in management decision making
2. Evaluate the influence of formal organization in causing, preventing and repairing damage to the physical environment
3. Identify the needs and rights a manager must balance in creating a socially responsible organization
4. Determine the extent that needs and rights of a manager are balanced in a given situation

Other (specify): ____________________

M	N	X

O. Government Regulation and Management Decisions

1. Identify federal, state and local government regulations with which a manager should be familiar

Other (specify): ____________________

M	N	X

P. Managerial Fields

1. Differentiate between the roles and responsibilities of top executives and those of lower level managers
2. Identify and explain the major functions and responsibilities of persons holding positions in marketing, distribution and sales management
3. Identify the key functions and responsibilities of production or operations managers
4. Identify the most important tasks and functions of financial management
5. Outline the major areas of concern for personnel managers
6. Analyze the planning and controlling tasks and responsibilities of a supervisory management position
7. Identify the role and responsibility of management in a non-profit organization

Other (specify): ____________________

M	N	X

Q. Information Systems and Management

1. Identify information uses, data sources, transmission channels and processing centers in an actual organization
2. Apply a method of information systems analysis in simple organizational settings
3. Identify characteristics of computer systems that are useful in integrated information systems

Other (specify): ____________________

M	N	X

R. Quantitative Methods for Management Decisions

1. Analyze decision making situations to reveal which aspects may be assisted by quantitative techniques
2. Apply a decision tree to a decision given appropriate numerical information
3. Interpret a simple game theory matrix

Other (specify): ____________________

*** NOTE: These duty bands are identified as a minimum core for a one-semester course in management in the marketing education curriculum.**

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12-92

M	N	X	**A. Exploring Entrepreneurship**
☐	☐	☐	1. Identify entrepreneurial opportunities
☐	☐	☐	2. Define the different motivations (reasons) for becoming an entrepreneur
☐	☐	☐	3. Identify the advantages and disadvantages of becoming an entrepreneur
☐	☐	☐	4. Explain the risks affecting the entrepreneur
☐	☐	☐	5. Define entrepreneurship and explain its importance in the private free enterprise system
☐	☐	☐	6. Identify and explain the advantages and disadvantages of being an employee vs being an employer (entrepreneur)
☐	☐	☐	7. Analyze the decision-making process and its importance to the entrepreneur
☐	☐	☐	8. Identify and discuss the personality traits and abilities of a successful entrepreneur
☐	☐	☐	9. Interpret the meaning of achievement motivation and the importance of independence to the entrepreneur
☐	☐	☐	Other (specify): ____________________

M	N	X	**B. Success and Failure of Entrepreneurs**
☐	☐	☐	1. Identify the main reasons for business failure in a private free enterprise system
☐	☐	☐	2. Identify the main factors contributing to a successful business
☐	☐	☐	3. Identify and select resources that can help entrepreneurs become competent
☐	☐	☐	4. Compare business failure rates in different industries
☐	☐	☐	5. Explain the necessity of a sound business plan to the entrepreneur
☐	☐	☐	6. Identify the steps involved in developing a business plan
☐	☐	☐	7. Explain the different failure rates of business due to the age of the business.
☐	☐	☐	Other (specify): ____________________

M	N	X	**C. Location and Ownership**
☐	☐	☐	1. Interpret the importance of selecting the proper location for a business
☐	☐	☐	2. Identify the advantages and disadvantages of buying an existing business
☐	☐	☐	3. Identify the advantages and disadvantages of starting a new business
☐	☐	☐	4. Explain the factors to consider when selecting the city or town in which to locate
☐	☐	☐	5. Analyze the steps involved in site selection
☐	☐	☐	6. Compare the different site considerations for: a retail establishment, wholesale establishment, service business, and manufacturing firm
☐	☐	☐	7. Identify resources to help the entrepreneur in site selection
☐	☐	☐	8. Compare the different types of leases
☐	☐	☐	9. Appraise the advantages and disadvantages of the four major types of ownership: independent partnership, corporation, franchise
☐	☐	☐	Other (specify): ____________________

M	N	X	**D. Government Regulations**
☐	☐	☐	1. Identify government regulations that affect the entrepreneur
☐	☐	☐	2. Detail the role of government regulation in a private free enterprise system
☐	☐	☐	3. Distinguish between the terms license and permit
☐	☐	☐	4. Identify agencies which license businesses
☐	☐	☐	5. Identify the types of federal state and local taxes that are the responsibility of the entrepreneur
☐	☐	☐	6. Interpret the dual role of business in managing
☐	☐	☐	Other (specify): ____________________

M	N	X	**E. Start-up Finance**
☐	☐	☐	1. Explain and calculate how to determine start-up cost for a business in a given situation
☐	☐	☐	2. Define fixed and variable costs
☐	☐	☐	3. Define equity financing
☐	☐	☐	4. Define debt financing
☐	☐	☐	5. Define trade credit
☐	☐	☐	6. Identify sources of financing for the entrepreneur
☐	☐	☐	Other (specify): ____________________

M	N	X	**F. Financial Management**
☐	☐	☐	1. Explain the importance of financial management to the entrepreneur
☐	☐	☐	2. Identify the components and explain the importance of a profit and loss statement
☐	☐	☐	3. Evaluate the importance of ratio analyses
☐	☐	☐	4. Compute break-even points
☐	☐	☐	5. Identify the components and explain the importance of a balance sheet
☐	☐	☐	6. Compare and contrast the terms current asset and fixed asset
☐	☐	☐	Other (specify): ____________________

M	N	X	**G. Control and Risk**
☐	☐	☐	1. Interpret the importance of business protection to the entrepreneur
☐	☐	☐	2. Identify management functions performed by the entrepreneur
☐	☐	☐	3. List the steps involved in making management decisions
☐	☐	☐	4. Identify the common problems encountered by the entrepreneur in the management role
☐	☐	☐	5. Define liabilities
☐	☐	☐	6. Explain the purpose of insurance
☐	☐	☐	7. Evaluate the different types of insurance the entrepreneur should consider
☐	☐	☐	8. Identify the steps involved in assessing the management capabilities of an entrepreneur
☐	☐	☐	Other (specify): ____________________

M	N	X	H. **Managerial Resources**
			1. Identify and describe organizations which offer managerial assistance to entrepreneurs
			2. Cite the advantages of affiliation with civic and professional organizations
			3. Appraise the role of the SBA (Small Business Administration)
			Other (specify): ______________________

M	N	X	I. **Record Keeping**
			1. Discuss the importance of accurate record keeping to the entrepreneur
			2. List the types of business records the entrepreneur needs to keep
			3. Compare and contrast single-entry record keeping and double-entry record keeping
			4. Perform the steps involved in reconciling a bank statement
			5. Identify the information needed for payroll records
			6. State the purpose of daily sales cash summary inventory and production records
			Other (specify): ______________________

M	N	X	J. **Marketing**
			1. Define marketing
			2. Identify the marketing functions important to the entrepreneur
			3. Identify the elements of the marketing (mix) strategy
			4. Show how the entrepreneur can use market research before the business is opened
			5. Find sources of information for market research
			Other (specify): ______________________

M	N	X	K. **Marketing Management**
			1. Identify and define the steps involved in market research
			2. Identify the steps involved in product planning
			3. Define distribution
			4. Compare and contrast the terms advertising publicity and sales promotion
			5. Compare and contrast the major media forms used for advertising
			6. Identify the advantages and disadvantages of extending credit to customers
			7. List and explain the major types of distribution channels
			8. State what is meant by product line diversification
			9. Show the elements that affect pricing practices
			Other (specify): ______________________

M	N	X	L. **Personnel Management**
			1. Detail the functions of personnel management
			2. Determine the relationship between unions and the entrepreneur
			3. Explain the accepted practices for hiring training and dismissing of employees
			4. Identify and explain different methods of compensation
			5. Compare the advantages of the different forms of internal communication used by businesses
			6. Define company groups
			7. Identify different ways of locating future employees
			Other (specify): ______________________

M	N	X	M. **Community Relations**
			1. Determine the importance of community relations to the entrepreneur
			2. Identify different ways the entrepreneur can achieve community involvement
			3. Define business image
			4. Develop objectives for a community relations program
			Other (specify): ______________________

Directions: Check the appropriate box below to indicate those competencies which the student has Mastered, Not Mastered, or Not Attempted.

Rating Scale: M **Mastered** -student has demonstrated appropriate level of competency
N **Not Mastered** - student has not reached appropriate level of competency
X **Not Attempted** - student did not have an opportunity to master this competency

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M	N	X	**A. Economic Systems**
			1 Define economics
			2 Define economic system
			3 Explain the concept of interdependence
			4 Identify the various types of economic resources
			5 Discuss the factors of production
			6 Compare and contrast the three basic kinds of economic systems
			7 Identify the basic economic questions
			8 Identify economic activities
			9 Explain the difference between macro and micro economics
			10 Compare and contrast consumer goods and producer goods

Other (specify)

M	N	X	**B Scarcity and Choices**
			1 Explain the meaning and causes of scarcity
			2 Distinguish between renewable and nonrenewable resources
			3 Explain the differences between primary wants and needs and intangible wants
			4 Discuss the "trade off" aspect of economic decision making
			5 Discuss the meaning and various types of utility

Other (specify):

M	N	X	**C. Measuring Economic Systems**
			1. Explain the concept of business cycle
			2. Explain the characteristics of money income and real income
			3. Differentiate between gross national product (GNP) and net national product (NNP)
			4. Calculate GNP in terms of real dollars and constant dollars
			5. Describe the elements and implications of the consumer price index

Other (specify):

M	N	X	**D. Supply and Demand**
			1. Explain the law of supply and demand
			2. Explain the demand curve
			3. Explain the supply curve
			4. Explain equilibrium price
			5. Find the equilibrium price by constructing the appropriate supply and demand curves for a given situation
			6. Explain the new buyer effect
			7. Explain the income effect
			8. Describe the substitution effect
			9. Compare and contrast competing demand and complementary demand
			10. Define elasticity of demand and explain the factors which determine elasticity
			11. Compare and contrast buyers' and sellers' markets

Other (specify):

M	N	X	**E. Profit**
			1. Discuss the profit motive
			2. Define profit

Other (specify):

M	N	X	**F. Competition**
			1. Define competition
			2. Distinguish between perfect and imperfect competition
			3. Discuss some restrictions which are placed on competition
			4. Distinguish between monopolies, trusts, and public monopolies

Other (specify):

M	N	X	**G. The Role of Money and Banking**
			1. Define money and describe its characteristics and functions
			2. Distinguish between currency and checks
			3. List and describe bank services
			4. Define interest in reference banking
			5. Explain the relationship between money supply and money available for lending
			6. Explain the role of the Federal Reserve System and discuss the control tools it uses
			7. Discuss the circular flow and explain the role of money in that model

Other (specify):

M	N	X	H. Role of the Consumer
			1. Define consumer
			2. Discuss the functions of various private and governmental agencies as they pertain to consumers
			3. Explain what is meant by "the consumer movement
			Other (specify):
			______________________
			______________________
			______________________

M	N	X	I. The Role of the Work Force
			1. Discuss various types of work
			2. Describe the types of unemployment and explain the causes of each
			3. Explain the rationale behind various laws which apply to the workforce
			4. Identify and explain the impact of federal regulations pertaining to organized labor
			5. Define organized labor and labor unions
			6. Discuss the collective bargaining process and the issues which management and labor might be forced to negotiate
			Other (specify):
			______________________
			______________________
			______________________

M	N	X	J. The Role of Government
			1. Explain the various federal acts which regulate the work place
			2. Discuss the purpose of a wage price freeze
			3. Compare and contrast the principles of taxation
			4. Describe the regulatory role of various federal agencies and explain the laws which created them
			5. Define fiscal policy
			6. Discuss the implications of a surplus and a deficit budget
			7. Explain what is meant by the national debt
			Other: (specify)
			______________________
			______________________
			______________________

M	N	X	K. Types of Business
			1. List and explain the functions of business
			2. Identify and discuss the nature of various types of business
			3. Define entrepreneurship
			4. Describe the role and functions of management
			5. Define various ownership forms and discuss the advantages and disadvantages of each
			Other (specify):
			______________________
			______________________
			______________________

M	N	X	L. The Role of Production
			1. Define production
			2. Explain the law of diminishing returns
			3. Explain how patent and copyright laws affect production
			4. Describe mass production in terms of its characteristics and economics of scale
			5. List and explain the production functions
			Other (specify):
			______________________
			______________________
			______________________

M	N	X	M. The Role of Marketing
			1. Define marketing and discuss the functions of marketing
			2. Compare and contrast the types of goods and services which flow through the consumer and business markets
			3. Define and discuss the "4 P's" of the marketing mix
			4. Define and describe several types of distribution channels and the functions performed by each
			Other (specify):
			______________________
			______________________
			______________________

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M	N	X	N. International Economics
			1. Define international finance
			2. Discuss the importance and characteristics of various methods and rates of international exchange
			3. Explain the importance of balance of trade
			Other (specify):
			______________________
			______________________
			______________________

Appendix 5A

Policies for Cooperative Vocational Education Programs

ROBERT E. BARTMAN
Commissioner of Education

DEPARTMENT OF ELEMENTARY AND SECONDARY EDUCATION
P.O. BOX 480
JEFFERSON CITY, MISSOURI 65102-0480

July 1, 1994

REVISION:
VOCATIONAL POLICY
LETTER 4

TO: School Administrators

FROM: Russell McCampbell, Assistant Commissioner
Division of Vocational and Adult Education

RE: Policies for Credit and Supervised Employment for Approved High School Cooperative Vocational Education Programs

Cooperative vocational education requires specific policies be adhered to in order to insure quality on-the-job training. Criteria for justification of credit must be established in compliance with the following guidelines:

1. The teacher/coordinator must provide both in-class related instruction and supervision of students' on-the-job training.
2. Cooperative students must be enrolled in both the class and the supervised employment simultaneously.
3. The cooperative education students' training stations must be appropriate for the occupational categories for which the program is designed.
4. There must be a written Instructional Management Plan (IMP) between the school and the training sponsor which identifies both in-class instruction and on-the-job training that the student will receive.
5. A current IMP must be on file for each student receiving cooperative credit.
6. There must be a written training agreement between the school and the training sponsor which assures that students are employed and compensated in conformity with federal, state, and local laws and without regard to race, color, national origin, sex, or handicap.

7. The credit awarded for on-the-job training should be 1 unit for each 10 hours of employment per week. No more than 2 units of credit may be awarded for on-the-job training.

8. Contracts providing employment time prior to the opening of school require a week for each twelve to fifteen cooperative trainees for counseling, placement, scheduling and job development.

9. The teach/coordinator's schedule must include 1 period per day for each 12-15 cooperative students for supervision of on-the-job training.

10. Evaluation of students on the job must include occupationally specific skills as well as attitudinal criteria.

Appendix 5B

Generic Training Agreements

TRAINING AGREEMENT - A

Student ______________________________
Home Address __________________________
City ____________________ Zip ________
Phone ______________________________
Job Title ____________________________
Social Security Number ________________

Teacher ______________________________
Employer _____________________________
Address ______________________________
City ____________________ Zip ________
Phone ______________________________

Training Period
Beginning Date ________________
Hours/Week ________________
Ending Date ________________
Hourly Wage ________________

The student enters this program to learn as much as possible from the employer in the nature of job information, skill and attitudes. The employer will determine the pay and hours the student will work. To earn credit the student must work a minimum of 10-15 hours per week.

THE STUDENT:

1. will, while in the process of training, have the status of student and will not displace any regular employee.
2. will conform to all rules and regulations of the school and place of employment. The employer expects honesty, punctuality, cooperation, courtesy, and willingness to learn.
3. will maintain regular attendance at school and on the job. On-the-job attendance includes days when school is not in session (e.g., winter break).
4. will report absences in advance to the employer and teacher. The student cannot receive credit for work on days when not in school unless previously approved by the teacher.
5. will keep all records and attend all recognition events (e.g., employer appreciation banquet) associated with this program.

THE PARENT/GUARDIAN:

1. will encourage the student to do well in work experience.
2. will be responsible for providing transportation for the student for the work experience activity.
3. will be responsible, along with the student, for the safety and conduct of the student while they are at or between the school, the place of employment, and home.

THE TEACHER:

1. will consult with the employer concerning the student's work.
2. will make periodic contacts/visits to the training station.
3. will counsel the student about the work experience.
4. will be available to help with training problems or program changes.

EMPLOYER:

1. will train the student with the competencies included in the IMP and those needed for all job-related duties. Training should include safety instruction.
2. will help in the evaluation of the student.
3. will conform to all federal, state and local laws and regulations regarding employment of compensation of students. Students are not eligible for unemployment benefits but must be covered by worker's compensation.
4. will reserve the right to discharge the student for just cause from the training station. The teacher requests consultation prior to the action.

The training may be discontinued at any time by any of the signers of this agreement, but each agrees to notify the others in advance. In the event that training is terminated, the teacher will make final determinations concerning credit received and reassignment of the student.

All adjustments in the training must be made through the teacher.

It shall be agreed that all parties participating in this program will not discriminate in training and/or employment opportunities on the basis of race, color, religion, gender, origin, or handicap.

______________________________Date______
Student

______________________________ Date______
Employer

______________________________Date______
Parent/Guardian

______________________________ Date______
Teacher

TRAINING AGREEMENT - B

Student________________________________ Employer________________________________
Address________________________________ Training Station ________________________
Residence Phone_________________________ Student Social Security Number______________
Parent or Guardian_______________________ Date___________________________________

1. The student agrees to:
___ a. Do an honest day's work.
___ b. Be punctual, properly attired and groomed, and loyal.
___ c. Follow instructions, avoid unsafe acts, and be alert to unsafe conditions.
___ d. Be courteous and considerate of the employer, customers, and others.
___ e. Keep required records of the cooperative education internship program.
___ f. Be alert to perform unassigned tasks which promote the welfare of the business.
___ g. Contact the teacher before resigning.

2. The parent/guardian agrees to:
___ a. The student's training station.
___ b. Provide transportation for the student to and from work.
___ c. Assist in promoting the value of the student's experience by cooperating with the employer and teacher when needed.

3. The teacher, on behalf of the school, agrees to:
___ a. Give systematic instruction at the school related to the student's duties and responsibilities at the training station.
___ b. Visit the student on the job at intervals for the purpose of evaluation.
___ c. Show discretion as to time and circumstances for visits, especially when work at the training station is more demanding.

4. The employer agrees to:
___ a. Provide the student with opportunities to learn how to do many jobs well in this business.
___ b. Assign the student new responsibilities according to their ability and progress.
___ c. Assist the teacher to make an honest appraisal of the student's performance and progress.
___ d. Avoid subjecting the student to unnecessary hazards.
___ e. Contact the teacher before discharging the student.

5. All parties agree to:
___ a. The length of the cooperative education period will include a minimum of _____ hours commencing ____________________________ and terminating ____________________________.
___ b. Working hours during the cooperative education period will normally be:
From: _________ To: _________ During Schools Days ________________________
From: _________ To: _________ On Other Days_____________________________
___ c. A beginning wage of _____________ per hour.

It shall be agreed that all parties participating in this program will not discriminate in training and/or employment opportunities on the basis of race, color, religion, gender, origin, or handicap.

We, the undersigned, agree that we have read and understand the purpose and intent of this Training Agreement.

Student________________________________ Employer________________________________

Parent_________________________________ Teacher_________________________________

School Official___________________________

TRAINING AGREEMENT - C

Student's Name____
Student's Address__________________________ Telephone____________
School________________________________ Telephone____________
Training Station___________________________ Telephone____________
Address____
Employer__________________________ Position__________________
Dates of Co-op Period: From__________________ To:____________________

RESPONSIBILITIES

The STUDENT considers their job experience as contributing to their career objectives and agrees:

1. To be regular in attendance, both in school and on the job.
2. To perform job responsibilities and classroom responsibilities in an efficient manner.
3. To show honesty, punctuality, courtesy, a cooperative attitude, proper health and grooming habits, appropriate dress, and a willingness to learn.
4. To conform to the rules and regulations at their training station.
5. To provide the teacher with necessary information about their co-op program and complete promptly all necessary reports.
6. To consult the teacher about any difficulties arising at their training station related to co-op program.
7. To participate in co-curricular school activities that are required in connection with the cooperative education program.

The PARENTS/GUARDIANS of the student, realizing the importance of the co-op program in the student attaining their career objectives, agrees:

1. To encourage the student to carry out effectively their duties and responsibilities.
2. To share the responsibility for the safety and conduct of the student while they travel to and from the school, the training station, and home.

The TEACHER, representing the school, will coordinate the co-op program toward a satisfactory preparation of the student for their occupational career objective, agrees:

1. To see that the necessary related classroom instruction is provided.
2. To make periodic visits to the training station to observe the student, to consult with the employer, and to render any needed assistance with problems of the student.
3. To assist in the evaluation of the student.

- over -

The TRAINING STATION, recognizing that the training agreement is being followed and that close supervision of the student will be needed, agrees:

1. To provide a variety of work experiences for the student that will contribute to the attainment of their career objectives.
2. To provide training for the student for at least the minimum listed number of hours each day and each week for the entire co-op period.
3. To adhere to all federal and state regulations regarding child labor laws, and other applicable regulations.
4. To assist in the quarterly evaluations of the student.
5. To provide time for consultation with the teacher concerning the student and to discuss with the teacher any difficulties the student may be having.
6. To provide available instructional material and occupational guidance for the student.

It shall be agreed that all parties participating in this program will not discriminate in training and/or employment opportunities on the basis of race, color, religion, gender, origin, or handicap.

Additional Comments:

By:

Student

Parent/Guardian

Employer

School Official

Teacher

Date

Appendix 5C

Instructional Management Plans (IMP)

INSTRUCTIONAL MANAGEMENT PLAN

Student________________________________ Career Goals________________________________
School________________________________ Training Station________________________________

RATING SCALE:

4 - Superior Performance by student
3 - Above Average Performance by student
2 - Average performance by student
1 - Poor performance by student

Ratings are assigned by the instructor in conjunction with the employer (where appropriate).

Curriculum Goal	**Application Experience**	**Evaluation for Current Grading Period:_____**

INSTRUCTIONAL MANAGEMENT PLAN

Student______________________________ Career Goals______________________________

School______________________________ Training Station____________________________

RATING SCALE:
4 - Superior Performance by student
3 - Above Average Performance by student
2 - Average performance by student
1 - Poor performance by student

Ratings are assigned by the instructor in conjunction with the employer , where appropriate.

Curriculum Goal	**Application Experience**	**Evaluation for Current Grading Period:_____**
Communication	A008: Complete information about a product or service sold by your place of employment. Write a letter to the manufacturer or supplier and give a report.	
Communication	A007: In a written report explain your company's dress code and grooming and reasons behind the policy.	
Communication	A008: Develop a plan to improve an aspect of your business (example: exchange policy, layaway, etc.)	
Economic Concepts	B001: Determine the marketing strategy of your place of employment. Prepare a report explaining your findings.	
Economic Concepts	B005: Develop a list of economic activities at your place of employment. Submit a report on your work.	
Economic Concepts	B019: Submit information concerning the market price for a new product or service at your place of employment.	
Advertising & Sales Promotion	H006: Take one product or service and explain the advantages and disadvantages of the promotion concerning that item. You may include interviews with customers.	

Appendix 5D

Coordination Visit Report Forms

COORDINATION VISIT REPORT

Student Name ____________________

Address ____________________

Phone Number ____________________

Training Station ____________________

Address ____________________ Phone __________

Employer ____________________ Phone __________

Special Information ____________________

____

____

____

____

Coordination Schedule*

Date	Purpose	Person Contacted	Action or Results

*Note: Because of the number of visits needed, each student will probably need more than one card.

Appendix 5E

Evaluation Forms

QUARTERLY EVALUATION - A

Ratings are assigned by the training sponsor.	Rating Scale 1. Excellent, above average. 2. Acceptable, but improvement possible. 3. Not acceptable, needs significant improvement.

Marketing Competencies	**Rating Scale**		
	1	**2**	**3**
(Marketing Education Teacher Coordinator will need to list below specific			
marketing competencies taught this quarter.)			

Comments:

Employer

Student

Teacher

Date

QUARTERLY EVALUATION - B

Student ______________________________ Date ____________
Training Station ______________________________
Employer ______________________________
Teacher ______________________________
School ______________________________ Quarter ____________

Personal Appearance and Grooming

1 2	3 4 5	6 7	8 9
Clothes not appropriate for job. Grooming needs attention.	Dresses adequately for job. Is usually adequately groomed.	Dresses well and is usually well groomed.	Always very well dressed. Makes a fine appearance.

Comments:

Job Knowledge

1 2	3 4 5	6 7	8 9
Knowledge of the job is limited.	Knowledge of job is adequate to answers most common questions.	Well informed on the job and related work.	Well informed on the job and makes the most of of knowledge and experience.

Comments:

Quality of Work

1 2	3 4 5	6 7	8 9
Careless and makes frequent and repetitive errors.	Work usually passable and requires some follow-up.	Usually does a good job and requires little follow-up.	Consistently excellent performance. Errors are rare.

Comments:

Quantity of Work

1 2	3 4 5	6 7	8 9
Output is frequently below the required amount.	Turns out the required amount of work but seldom more.	Usually does more than is expected.	Output is unusually high. An exceptionally fast worker.

Comments:

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Customer Relations

1 2	3 4 5	6 7	8 9
Little interest in maintaining good customer relations. Irritates customers.	Occasionally irritates customers. Uses little tact and diplomacy.	Courteous and helpful to customers. Uses tact and diplomacy.	Unusually good customer relations. Builds customer patronage.

Comments:

Attitude Towards Co-Workers

1 2	3 4 5	6 7	8 9
Has difficulty in working with others.	Teamwork is adequate for good performance, does own share of work.	Works well with others. Meets others halfway.	Extremely effective in working with others. Goes out of the way to help others.

Comments:

Ability to Take Criticism

1 2	3 4 5	6 7	8 9
Resents criticism. Has chip on shoulder.	Resents criticism but does the job. Occasionally flares up.	Accepts criticism and fairly even-tempered.	Accepts and uses criticism in personal development and is even-tempered.

Comments:

Self-Confidence and Maturity

1 2	3 4 5	6 7	8 9
Is very immature. Has complete lack of self-confidence and poise.	Seems immature at times. Has little self-confidence.	Is mature and shows poise and self-confidence.	Is very confident and self-assured for age.

Comments:

Adaptability

1 2	3 4 5	6 7	8 9
Has great difficulty in adjusting to new work and requires repeated instructions.	Requires detailed instructions in adapting to new tasks.	Can turn from one type of work to another with little time and instruction.	Learns new duties quickly and adjusts to changed conditions easily.

Comments:

Dependability

1 2	3 4 5	6 7	8 9
Is unreliable and will not accept the responsibility required on the job.	Accepts responsibilities but not entirely dependable.	Accepts responsibility of the job and normally can be depended upon.	Accepts responsibility and is completely dependable on the job.

Comments:

Communication Skills

1 2	3 4 5	6 7	8 9
Poor or awkward grammar affects job performance.	Occasionally has difficulty in communicating with others.	Usually communicates effectively with others.	Communicates clearly, pleasantly, conveying spirit and enthusiasm.

Comments:

Motivation

1 2	3 4 5	6 7	8 9
Wastes time unnecessarily. Unable to identify work that needs to be done.	Does only the obvious work.	Works steadily. Does a good day's work.	Does more than required. Has high degree of enthusiasm and interest.

Comments:

Attendance

Has the student's attendance been satisfactory for the requirements of the job? ___ Yes ___ No

---

Additional Comments:

Employer ______________________________ Student ______________________________

Teacher ______________________________ Date ______________________________

COOPERATIVE EDUCATION EVALUATION FORM - C
EMPLOYER'S RATING SHEET

Student ______________________ Quarter ______________________

Training Station ______________________

Employer ______________________ Teacher ______________________

TO THE EMPLOYER: The progress made by the student depends to a great extent upon the help and understanding given by you and by the school. Your evaluation of the student's work will help in determining the grade and in planning additional training. Please place an "X" in the proper space. The statement on the left indicates the highest rating and the statement on the right indicates the lowest rating. Omit any areas that you feel do not apply to the student or to the work performed.

	5	4	3	2	1	
PERSONAL TRAITS						
1. Listens carefully to instructions						Poor listener
2. Catches on first time						Needs repeated instructions
3. Positive response to criticism						Negative response to criticism
4. Works well with other employees						Poor team work
5. Exhibits self-control						Loses control easily
6. Makes appropriate appearance						Should improve appearance
7. Can be depended upon						Is not reliable
8. Exhibits good judgement						Inclined to jump to conclusions
9. Is self-confident						Lacks confidence
10. Shows initiative						Performs only routine duties

-over-

ATTENDANCE	**5**	**4**	**3**	**2**	**1**	
11. Emergency absence only						Frequent absences
12. Arrives on time						Frequently late
JOB TRAITS						
13. Seeks understanding of business operations						Never asks questions
14. Exhibits knowledge of product information						Needs to study
15. Keeps work area orderly						Is careless
16. Performs general work assignments accurately						Frequent errors
17. Performs necessary mathematics with accuracy						Frequent errors
18. Completes work assignments						Is not thorough
19. A good representative of the business						Creates negative image
20. Uses equipment properly						Damages equipment

RATING SCALE

5	Superior Performance	2	Poor Performance
4	Above Average Performance	1	Lack of Performance
3	Average Performance		

COMMENTS:

Employer ____________________ Student ____________________

Teacher ____________________ Date ____________________

QUARTERLY EVALUATION - D

Student ______________________ Training Station ______________________

Employer ______________________ Date ______________________

QUALITY OF WORK: Is employee's work neat, accurate, and thorough? Are prescribed rules followed? Are details given proper attention?	Consistently does an excellent job -- outstanding	Does fully satisfactory work	Does work somewhat inaccurately or carelessly	Does indifferent or poor work
QUANTITY OF WORK: Is the amount of work completed satisfactory in comparison with what others do with equal experience? Are assignments completed promptly?	Works very rapidly -- consistently high volume	Does a good day's work -- satisfactory volume	Does somewhat less than expected -- works rather slowly	Works very slowly
INDUSTRY: Does employee work with diligence and energy?	Is always busy at a productive work -- unusually diligent	Is busy most of the time -- satisfactory effort	Tends to waste time -- needs to be urged	Consistently wastes time
ABILITY TO LEARN: Does employee grasp details readily? Require repetition? Understand? Remember details?	Learns very quickly and retains details	Learns in normal instruction period	Learns more slowly than usual or does not retain	Is slow in learning -- has difficulty even after repeated instructions
INTEREST: (Attitude toward job) Does employee show a genuine interest in job by general attitude? By asking intelligent questions and trying to improve?	Shows unusual interest -- enthusiastic	Has satisfactory interest	Shows some lack of interest	Shows definite lack of interest or dislikes
ACCEPTANCE BY CO-WORKERS: How well is employee accepted by associates? Do they like to work with this employee?	Unusually well liked by everyone	Accepted by associates in a satisfactory manner	Does not mix too well -- no serious difficulty	Is not accepted as one of the group or is disliked

-over-

APPEARANCE: Is employee always neat and clean? Ever careless of appearance? Are clothing and grooming appropriate?	Is always neat, clean, and, appropriately dressed	Grooming and dress are entirely satisfactory	Is careless at times or dress is not always appropriate	Is careless of grooming or inappropriately dressed
MANNERS: Is employee courteous? considerate and thoughtful of others?	Is unusually courteous and thoughtful of others	Is polite and considerate -- fully satisfactory	Is sometimes careless or thoughtless of others	Is lacking in consideration of others -- rude
ATTITUDE TOWARD SUPERVISORS: Does employee respond willingly and cheerfully? Will employee accept constructive criticism?	Cooperates fully and cheerfully	Cooperates satisfactorily	Is sometimes reluctant to cooperate or resents correction	Displays an antagonistic attitude
OVER-ALL POTENTIAL WORTH TO COMPANY: Based on your observations to date, what is your over-all opinion of this employee?	Shows unusual promise -- outstanding	Is entirely satisfactory -- but not unusual	Has only minor deficiencies -- will probably be satisfactory	Substantial improvement needed

Number of times

Absent ________________

Tardy ________________

COMMENTS:

________________________ ________________________
Employer Student

________________________ ________________________
Teacher Date

Appendix 5F

Cooperative Education Forms

Application for Admission
Cooperative Education Program

Date ______________________________

Current Year in School: 11 12 (circle one)

Name ____ Home Phone ________________

Address ______________________________________ City _______________ Zip Code ______

Age _______ Date of Birth _______________ Social Security Number ________________

Do you plan to continue your education after graduation from high school? __________ If so, what school(s) are your considering? ____

____

Explain any physical conditions or disabilities which would limit you in the performance of certain types of work:

____

(The school does not discriminate against students on the basis of race, color, gender, national origin, or handicap.)

Present Class Schedule:

Period	Class	Teacher	Room #
0 Hour			
1			
2			
3			
4			
5			
6			

If you have been employed, list:

Name of Firm	When Employed? From/To	Job Title

- over -

Are you employed now? ________ If so, where? ______________________________

Have you decided upon an occupation or career? ________________

If so, what is it? ____

If you are undecided, what type(s) of careers/jobs are you thinking about going into?________________

____

Father's Occupation: ________________________________

Father's Employer: ________________________________

Mother's Occupation: ________________________________

Mother's Employer: ________________________________

High School Subjects Taken:

9th Grade	10th Grade	11th Grade

STUDENT RECOMMENDATION

____
Evaluator

______________________________ has applied for enrollment in the Cooperative Education Program. Students who are accepted will receive classroom instruction related to their employment, as well as training on the job in the business community.

Please fill out the form below on the basis of your contact with the student.

This form is confidential and will not be seen by the student . . . . . please feel free to be candid with your comments.

Thanks!

____
Teacher

	Poor	Below Avg.	Average	Above Avg.	Superior	Excellent
Attendance						
Classroom Conduct						
Mental Alertness						
Appearance						
Social Skills						
Dependability						
Leadership						
Ambition						

Additional Comments:

____

____

____

____

____

____
Signature

Employment Verification

Cooperative Education Program

________________________________ is employed by our business.
Student

____________________________________ ______________________________________
Name of Business Telephone Number

____________________________________ ______________________________________
Street Address City/Zip Code

as a ____.
Name of Position

He/She began employment with us on __________________________________, 19____.

____________________________________ ______________________________________
Signature of Employer Title

____
Printed Name of Employer

Thank you!

Teacher
High School
Address
Phone Number

Place of Employment - Change Request

Cooperative Education Program

TOPIC: Termination ____________ Job Change Request ____________

Student ____ Class ____________________ Period ____

Employer ____

Length of Employment ____

Reason (Give Details):

____

____

____

____

____

____

____

____

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____

____

Signed: ____ Date ______________________________
Student

Approved ______________________ Disapproved ____________________ Date ______________

Teacher ____

Note: The parent student agreement states that changes can be made only with prior approval from the Cooperative Education Teacher.

WEEKLY TIME SHEETS

SUMMARY OF WORK SCHEDULE AND EARNINGS

DATE	CHECK-IN TIME	CHECK-OUT TIME	HOURS	
			REGULAR	OVERTIME
		Total Hours		

Regular Hourly Rate ____________ Regular Earnings ____________

Overtime Rate ____________ Overtime Earnings ____________

Total Gross Earnings ____________

Less Deductions:

Federal Withholding ____________

FICA ____________

State Withholding ____________

Other ____________

Total Deductions ____________

Net Earnings for the pay period ____________

PAY RECORD

NAME ________________________ EMPLOYER ________________________ SEMESTER __________ 19____

PAY		HOURLY RATE	HOURS WORKED	AGGREGATE HOURS WORKED	GROSS PAY	GROSS PAY TO DATE	DEDUCTIONS			NET PAY (take home)	TOTAL NET PAY TO DATE
FROM	TO						TAXES	FICA	OTHER		

WEEKLY REPORT

COOPERATIVE EDUCATION PROGRAM

Training Station: ______________________ Student: ______________________

Week Ending: ______________________

Since school credit is granted for work, it is important that this Weekly Report be returned to your teacher during the first class period following your work week.

DAY	IN	OUT	TOTAL HOURS	RATE	EARNINGS	JOBS PERFORMED
MON						
TUES						
WED						
THURS						
FRI						
SAT						
SUN						
TOTAL HOURS				TOTAL EARNINGS		

1. What problem(s) occurred that you would like help or class discussion?
2. How did you handle the situation(s)?
3. What new jobs or procedures did you learn from your work this week?
4. Give a brief description of the most interesting incident or experience you had during the week:

Appendix 5G

DESE Policy on Granting Credit for Off-Campus Programs

DESE POLICY ON GRANTING CREDIT FOR OFF-CAMPUS PROGRAMS OTHER THAN DUAL-CREDIT COLLEGE COURSES

Many students who are juniors and seniors in high school can benefit substantially from school-directed and supervised learning experiences which cannot be readily provided within a regular school setting, but which can be made available through assignment to off-campus locations under cooperative arrangements with business and industry or other institutions. The Department of Elementary and Secondary Education recognizes and will approve the five types of off-campus programs discussed below. A school district may offer other types of off-campus programs without Department approval, but the students enrolled in them may not be counted in membership and attendance for state aid purposes, and the students may not be granted high school credit for the off-campus experience (Auth: Sections 161.092 and 161.122, RSMo).

Academic programs operated off-campus ordinarily involve students who are enrolled in advanced academic or fine arts classes and have as their goals the acquisition of specialized knowledge and the ability to apply the knowledge to situations which cannot be replicated in a school classroom.

Cooperative vocational education programs involve students enrolled in approved cooperative vocational education programs. The primary goals are the acquisition of specific job skills and demonstrated performance of those skills on the job. Students participating in cooperative vocational education programs are expected to perform productive work during their off-campus experience and may receive pay for it. Programs must meet standards of the Division of Vocational and Adult Education and be approved by that Division.

Work experience for special education students is limited to students with disabilities whose individualized education programs (IEPs) indicate the need for work experience and who are also eligible as clients of the Division of Vocational Rehabilitation. Program goals include the acquisition of general skills related to performing work under supervision, as well as job-related skills. Students with disabilities may receive pay for the performance of productive work in an approved program.

Career exploration programs involve students who have not yet selected occupational goals and who will benefit from exposure to a variety of occupations, as practiced on the job site so that they may develop their own occupational objectives from direct experience. Students in career exploration programs must receive related instruction as a part of the regular high school program and be placed at off-campus sites in accordance with the provisions for granting high school credit in off-campus programs. Students in career exploration programs may spend no more than nine weeks (an academic quarter) at a particular job site, and then must be rotated through other job sites of interest at least every nine weeks for the duration of the program. The specific amount of time a student spends at a given job site (within the nine-week maximum) will be determined by the complexity of the occupation being studied. Related instruction will provide students with knowledge of occupational clusters, requisite training and experience for occupations being studied, and skills related to obtaining and holding a job. Students in career exploration programs will not be performing productive work, and may not receive pay for participation in the off-campus program.

Apprenticeship programs provide structured work-based learning experiences provided by employers within an industry or occupational cluster combined with secondary and postsecondary classroom instruction. The experience results in academic credentials and certification of occupational mastery. Apprenticeship programs must meet published criteria and are individually approved by the Division of Vocational and Adult Education.

Students in cooperative vocational education programs, apprenticeship programs and in work-experience programs for special education students who are receiving pay for work performed in an off-campus program will generally be covered by the sponsors' workers' compensation insurance and general liability insurance. Students in academic programs and career exploration programs will not be paid and will not be covered by the sponsors' workers' compensation insurance and general liability insurance. Therefore, any school district which arranges off-campus academic or career exploration programs must provide accidental injury and job-related illness insurance for students and liability insurance to cover any injuries or damages caused by students on the sponsors'

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premises. Liability insurance to protect the supervising teacher and any other school district employees who might be exposed to a liability risk due to the placement of students in off-campus programs should be provided by the school district.

Since there is a danger of unpaid students replacing paid employees, the school district and the cooperating sponsor should exercise extreme diligence in complying with applicable state and federal labor regulations.

All five types of off-campus programs must be well-planned and adequately supervised by school district personnel to ensure the school district's eligibility for state and federal funds and to justify the awarding of high school credit to participating students. The following general policies will apply.

I. Attendance eligible for State Foundation Monies

To be counted for membership and average daily attendance for state aid purposes, students must be under the guidance and direction of certificated teachers employed by the public school district whether the instruction (teaching process) is on campus or off campus. Students who are at least 16 years of age and not over 21 years of age and who are under the guidance and direction of public school teachers for less than the standard school day may be counted as part-time students. (Their part-time membership and attendance are computed according to Section 163.011, RSMo.)

School districts shall not count students in membership or attendance for any type of off-campus instruction except Department-approved off-campus programs which are adequately supervised by the district's certificated teachers to the extent the students can be considered "under the guidance and direction of teachers in the teaching process" and for which the school district is granting high school credit. School districts have responsibility (and probably liability) for students during the time they are counted for school membership and attendance for state aid purposes.

II. Direction and Supervision of Students in Off-Campus Programs

As indicated in Section I, to be counted for state aid purposes, students in off-campus programs must be under adequate supervision by appropriately certificated teachers of the public school district. Supervision of off-campus students is considered adequate and teachers appropriately certificated if the following standards are met:

A. Teacher Qualifications

Off-campus academic programs must be under the supervision of a teacher certificated in the subject in which the related on-campus instruction is provided. For example, if students enrolled in a chemistry class are provided off-campus instruction in the chemistry lab of an industrial facility, the supervising teacher would have to be certificated to teach chemistry. If no specific certification is available, as in the case of subjects such as "computer science," a teacher who is considered qualified to teach the related on-campus class will be considered qualified to supervisor the off-campus program.

Teachers holding cooperative vocational education certification are qualified to supervise students employed at training stations appropriate to the occupational categories for which the cooperative vocational education program is designed.

Work-experience programs for students with disabilities must be under the supervision of a special education teacher who has been designated and approved as a vocational adjustment coordinator. The vocational adjustment coordinator would also provide or coordinate the related instruction in the regular school program.

Career exploration programs must be under the supervision of a teacher who provides related classroom instruction in career awareness and related areas, and who has certification as a social studies teacher or as a guidance counselor.

Apprenticeship programs must be under the supervision of teachers who meet current criteria established by the Division of Vocational and Adult Education.

B. Supervision Time

The supervising teacher or coordinator must be provided scheduled supervision time within the standard school day at the ratios set out below, or if any part of the off-campus program is scheduled outside the regular school day, the school district must pay the supervising teacher or coordinator for the outside-of-school time necessary to provide supervision at the ratios set out below.

Off campus academic programs: one class period daily for each ten participating students.

Cooperative vocational education programs: one class period daily for each 12 to 15 participating students.

Work experience for students with disabilities: one class period daily for each 8 to 15 participating students, depending upon the nature and severity of the disabling conditions.

Career exploration programs: one class period daily for each 15 participating students.

Apprenticeship programs: based on individual program approval.

C. Written Plans

For each student in an off-campus program, there must be a written instructional plan, cooperatively developed between the supervising teacher or coordinator and appropriate persons at the off-campus site. The written plan must set forth specific measurable objectives to be achieved by the student and describe a plan for evaluating student performance. In the case of students with disabilities, the IEP and Individual Written Rehabilitation Plan should contain specific provisions to satisfy these requirements. If any federal funds are involved, the school district must also secure from the off-campus cooperating institution assurances of compliance with Title VI (Civil Rights), Title IX (Sex Discrimination), Section 504 (Discrimination against the Handicapped), and Drug-Free Workplace Requirements.

III. Granting High School Credit for Off-Campus Programs

To b eligible for off-campus instruction programs, students must be (1) 16 years old or older; (2) juniors or seniors in high school (except disabled students who need only be 16 or older and otherwise eligible); and (3) enrolled in classroom instruction directly related to and supportive of the off-campus instruction (related instruction) which is provided as a part of the school district's regular high school program. Eligible high school students participating in approved off-campus programs may be awarded high school credit in accordance with the following guidelines:

A. Off-campus students must be enrolled in and receiving related instruction in the regular high school program before credit can be awarded for off-campus experience. This restriction does not apply to disabled students whose IEPs indicate full-time work experience or to students participating in Option One of the Trade and Industrial/Health Occupations Internship Program.

Related instruction for students in cooperative vocational education programs must be concurrent with their off-campus experience. Related instruction for students may be less frequent than daily, but in no case may the related instruction be less than enough to justify a half-unit of high school credit (3,915 minutes).

B. One-half, one, or more units of credit (depending on the number of minutes of instruction) may be awarded for the related classroom instruction in the regular program. Additional high school credit for off-campus study or work experience in approved programs may be awarded under the following standards:

> Students may be awarded one unit of credit for 10 to 19 hours weekly of off-campus study or work experience, which would total between 300 and 600 hours during a school year, or two units of credit for 20 or more hours weekly of off-campus study or work experience.
>
> No more than two units of credit, or twice the number of units of credit granted for related instruction (whichever is less) may be granted for off-campus study or work experience during any school year for off-campus academic programs, cooperative vocational education programs, and career exploration programs.
>
> Students with disabilities whose IEPs indicate a need for additional supervised work experience to make the transition from school to the world of work may earn up to four units of credit during an academic year for off-campus work experience. The additional two units of credit would be based on increments of 20 to 30 hours weekly and 30 to 40 hours weekly of supervised work experience.

C. High school credit awarded students for off-campus programs will be assigned to subject areas on the basis of the certification of the supervising teacher or coordinator, the related regular classroom instruction, and the nature of the off-campus program. Credit granted for off-campus instruction shall be counted as elective credit. Off-campus credit may be counted toward meeting the classification and accreditation standards for curriculum only when in a vocational educational program approved by the Department. Other types of off-campus credit may not be counted toward meeting the curriculum standards.

IV. Authorization to Conduct Off-Campus Programs

Written proposals for off-campus programs must be approved annually by the appropriate section of the Department of Elementary and Secondary Education if the students are to be counted in membership and attendance for state aid purposes, if any special funding is involved, or if high school credit is to be granted. The following are procedures for obtaining approval:

A. Off-Campus Academic Programs: Off-campus academic programs must be submitted in writing and approved in advance by the Coordinator, Supervision of Instruction Section. School districts wishing to establish such programs must submit a detailed written proposal for review and action.

B. Cooperative Vocational Education Programs: Cooperative vocational education programs must be approved by the Division of Vocational and Adult Education. School districts wishing to establish such programs should apply for program approval to the appropriate section in that Division. All programs approved by the Division of Vocational and Adult Education must be designed and operated in conformity with the general policies of the Department and the specific provisions in the Vocational Education policies.

C. Work Experience for Students with Disabilities: Work experience for special education students who are also eligible as clients of the Division of Vocational Rehabilitation may be provided under the general policies of the Department and the specific provisions in the State Plan for Part B of the Individuals with Disabilities Education Act (P.L. 94-142). School districts wishing to establish work-experience programs for disabled students should apply to the Division of Vocational Rehabilitation.

NOTE: Students with disabilities who are not eligible as clients of the Division of Vocational Rehabilitation may be provided on-the-job work experience only through cooperative vocational education programs approved by the Division of Vocational and Adult education as described in paragraph B above.

D. Career Exploration Programs: Career exploration programs must be submitted in writing and approved in advance by the Coordinator, Supervision of Instruction Section. School districts wishing to establish such programs must submit detailed written plans for review and action.

E. Apprenticeship Programs: These proposals must be submitted to and approved in advance by the Division of Vocational and Adult Education.

Appendix 7A

Generic Letter of Invitation for Advisory Committee Members

GENERIC LETTER OF INVITATION FOR ADVISORY COMMITTEE MEMBERS

Date

Ms. Jane Jones
213 Cedar Avenue
Somewhere, MO 65432

Dear Ms. Jones:

Your experience and exemplary reputation have led to your recommendation for membership on the Marketing Education Advisory Committee at (insert name of school). The committee is composed of outstanding business, industry, and civic representatives from our community. It works to develop partnership between business and education by continually improving the vocational preparation for our students.

Your insight into the skills needed for today's competitive workplace would be of great value. Our committee and our school's desire is to prepare young people to gain those necessary skills.

We realize your time is limited and we will make every effort to keep our meetings prompt, precise, and purposeful. There will be (insert number) meetings a year for each of the three years of your term.

We invite you to become a member of the Marking Education Advisory Committee; your three-year term would begin on (date). Please consider this invitation and inform us of your decision by (date). We look forward to working with you.

Sincerely,

Teacher, and/or
School Official

Appendix 7B

Generic Letter of Appointment to Advisory Committee

GENERIC LETTER OF APPOINTMENT TO ADVISORY COMMITTEE

Date

Mr. Don Belton
421 West Broadway
Somewhere, MO 65432

Dear Mr. Belton:

Congratulations on your appointment to the Marketing Education Advisory Committee. Thank you for your willingness to serve. Your contribution will keep the program effective and up to date as well as help to make our community a better place in which to live and work.

We realize your time is limited and we will make every effort to keep our meetings prompt, precise and purposeful. There will be a minimum of two meetings a year for each of the three years of your term. Your first meeting as a member is scheduled for (insert date and time) at the (name/address of school). (Insert name), the Committee Chair, will contact you to provide you with a tentative agenda and other materials.

We look forward to working with you. If you have any questions, please call.

Sincerely,

Chair, (high school) Board Member
(Principal/Superintendent)

Appendix 8A

Form FV-4

Number: 6-920-004
FV-4

DEPARTMENT OF ELEMENTARY AND SECONDARY EDUCATION
Division of Vocational and Adult Education
P.O. Box 480, Jefferson City, Missouri 65102-0480

Application for Authorization of Vocational Education Expenditures

PLEASE READ INSTRUCTIONS ON REVERSE SIDE.

Fiscal Year Ending **June 30, ______**	Vendor Code	Local Education Agency (LEA)
Program Codes (Program and Type)		Mailing Address
Description of Program		City and Zip Code

Items Submitted For Approval

Description of Items	Quantity	Estimated	
		Unit Cost	Total Cost
		$	$

Total Estimated Cost $

FOR STATE OFFICE USE ONLY

County District	School Number	Program Code	Area Code	Year Paid	Year Chg.	Purpose	Expenditure	Reimbursement	State	Federal	Source	Section Code
							$	$	$	$		

______________________ Program Director

______________________ State Director of Vocational Education

______________________ Approval Date

MO 500-01304 (4-91)

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Instructions

Two copies of this *Application for Authorization* are to be submitted to the Director of Vocational Finance. After they have been processed, one copy indicating the approved items will be returned to the LEA. The Certification Section at the bottom of this page should be completed prior to sending it to the State Office for approval. A separate *Application for Authorization* must be filed for each program or service area and each type of program. Only those items having prior approval on this application may be claimed for reimbursement.

Vendor Code: Enter the county-district code used by the Department of Elementary and Secondary Education for payment purposes.

Local Education Agency (LEA): Report the official name of the school district, the mailing address, city and zip code.

Program Codes and Description of Program: A separate *Application for Authorization* must be filed for each program or service area and each type of program. The program code will, therefore, always be a two-part code as illustrated on the division's program code listing.

SIGN BELOW

CERTIFICATION

The local education agency hereby requests authorization to expend funds for Vocational Education as described on the reverse side of this form to be used for instructional programs approved under the provisions of the State Plan for Vocational Education.

It is understood that the title to equipment and teaching aids is to be vested in the school district with accountability to the Department of Elementary and Secondary Education. No disposition or diversion of use may be made without written Department approval. If such property is sold or no longer used for the purposes requested and approved, the Department of Elementary and Secondary Education is to be credited with its share of the value as determined by the sale price or fair market value.

It is further understood that the LEA will furnish the Department information required for supporting claims for funds, and maintaining financial aid inventory records within the LEA.

Date ______________________ Signed ______________________________
(Chief Administrator)

Appendix 8B

Form FV-2

Number: 6-920-002B
FV-2

STATE OF MISSOURI
DEPARTMENT OF ELEMENTARY AND SECONDARY EDUCATION
Division of Vocational and Adult Education
P.O. Box 480, Jefferson City, Misosuri 65102-0480

Reimbursement Request for Approved Vocational Education Expenditures

PLEASE READ INSTRUCTIONS ON REVERSE SIDE.

Fiscal Year Ending June 30, ________	Vendor Code	Local Education Agency (LEA)
Program Codes (Program and Type)		Mailing Address
Description of Program		City and Zip Code

Items For Which Reimbursement Is Claimed

(1) Date Purchased	(2) From Whom Purchased	(3) Description of Item Attach Invoices	(4) State Use Only	(5) Expenditure	(6) Check No.
				$	

TOTAL EXPENDITURE $

FOR STATE OFFICE USE ONLY

District Code		Sec. Code	Sch. Code	Program Code			Area Code			Year Code		Purp.	Source	State Amount	Federal Amount	Expenditure	Reimbursement
										P	C						
														$	$	$	$

Approved by: ______________________________

O 500-01303 (4-91)

Instructions

Submit two (2) copies of this form for each level of each program area to the Director of Vocational Finance, Missouri Department of Elementary and Secondary Education, Jefferson City, Missouri 65102-0480.

Vendor Code: Enter the county-district code used by the Department of Elementary and Secondary Education for payment purposes.

Local Education Agency (LEA): Report the official name of the school district, the mailing address, city and zip code.

Program Codes and Description of Program: A separate *Application for Authorization* must be filed for each program or service area and each type of program. The program code will, therefore, always be a two-part code as illustrated on the division's program code listing.

Column (1) — **Date Purchased** — This is the date of obligation by written purchase agreement (purchase order, letter, or contract). Expenditures for the acquisition of equipment, supplies, teaching aids, etc., will be considered as an expenditure in the fiscal year in which the funds were obligated by a purchase agreement or legal contract.

Column (2) — **From Whom Purchased** — This is the vendor or person with whom the agreement is made.

Column (3) — **Description of Item** — This should be a short identifying statement of the item, service, activity, etc. Detailed descriptions, serial numbers and other information should be outlined on the invoice supporting the transaction.

Column (4) — **State Use Only** — Do not complete.

Column (5) — **Expenditure** — This is the amount paid for each item described. Show deductions on invoices for discounts, credits, and other memos. Freight costs are considered as part of the equipment expenditure. Only items approved on Form FV-4 may be reimbursed. An **equipment** item is a unit of furniture, an instrument, a machine, an apparatus or a set of articles which does not meet the criteria of being a supply. **Supplies** are those items which (1) are consumed in use; (2) lose their shape or identity with use; (3) are expendable, that is, it is more feasible to replace it than repair it; or (4) are inexpensive. **Other** expenditures are those which represent services such as utilities, communications, transportation, etc.

Column (6) — **Check No.** — This is the number of the check which represents payment for each item described.

Total Expenditure — This is the sum of all Column (5) Expenditures entries.

CERTIFICATION To: Division of Vocational and Adult Education Jefferson City, Missouri 65102-0480 I hereby certify that the information reported herein is correct to the best of our knowledge and belief.	Date Signed: Chief Administrator:

Appendix 9A

MSIP Documentation

MSIP Documentation

8.3 Vocational Education

1. Curriculum guide for each vocational education program/course including (8.3 A, 8.3 B):
   a. statement of philosophy
   b. measurable program/course objectives
   c. learner outcomes (competencies)
   d. instructional/teaching plan
   e. student outcomes measurement procedures/instruments

2. Recordkeeping system to record student outcomes mastery (8.3 B)

3. Course description booklet/document for entire institution including vocational education courses (8.3 A)

4. Secondary teacher schedule (8.3 A)

5. Printout of core data course and assignment screen (screen 20) educator screen (screen 18) for each vocational education teacher (8.3 A)

6. Listing of supportive services provided for students enrolled in vocational education programs/courses (8.3 A, 8.3 D)

7. Results of labor market and student needs assessments (survey information, collected data, etc.) (8.3 A)

8. Membership rosters of all vocational student organizations (8.3 C)

9. Current program of work for all vocational student organizations (8.3 B, 8.3 C)

10. All documents used with any off-campus education programs including:
    a. application
    b. student selection criteria
    c. training plans/agreements
    d. list of training stations
    e. supervision procedures
    f. description of student experiences, activities and/or outcomes

11. Vocational education advisory committee(s) membership roster and minutes of meetings (8.3 A, 8.3 B)

12. Vocational education program/course evaluation plan and latest report (8.3 E)

13. Vocational education student follow-up data (8.3 A, 8.3 E)

14. Long-range plans for vocational education program improvement (8.3 D)

15. Copies of any articulation agreements with postsecondary institutions

Note: Department Documentation Provided Reviewer
--approved program listing (directory)
--district special populations report

Appendix 9B

Student Evaluation of Instructor

STUDENT EVALUATION OF INSTRUCTOR

DIRECTIONS: In an effort to improve the marketing education program, I would appreciate you completing this form which will reflect your evaluation of my teaching performance. You do not have to sign this evaluation form, and your comments will be kept strictly confidential.

	ITEMS	POOR	FAIR	GOOD	EXCELLENT
1.	The teacher was prepared for class.	____	____	____	____
2.	The teacher's presentations are well organized.	____	____	____	____
3.	The lesson objectives are clear to me.	____	____	____	____
4.	The teacher is interesting and enthusiastic.	____	____	____	____
5.	The teacher motivates me to learn more.	____	____	____	____
6.	The teacher communicates so that I can understand.	____	____	____	____
7.	The teacher was receptive to student suggestions.	____	____	____	____
8.	The class activities were interesting and helped me to achieve the lesson objectives.	____	____	____	____
9.	The teacher would admit when they didn't know the answer.	____	____	____	____
10.	I could read the teacher's handwriting.	____	____	____	____
11.	Our classroom was clean and attractive.	____	____	____	____
12.	The teacher had good classroom management.	____	____	____	____
13.	The teacher gave me feedback so that I could improve.	____	____	____	____
14.	The teacher's tests were fair.	____	____	____	____
15.	The teacher's grades were fair.	____	____	____	____

COMMENTS:____

____

____

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Appendix 9C

Student Follow-Up Questionnaire

STUDENT FOLLOW-UP QUESTIONNAIRE

DIRECTIONS: Please complete all sections of this survey. When you have completed the survey return it in the enclosed self- addressed stamped envelope. All responses are held in strict confidentiality.

Personal Data

Name:____

Mailing Address:____________________________________

____

Home Telephone: (   ) _______________

Employment History

1. Are you currently employed:
   _______ FULL-TIME (30 hours or more per week)
   _______ PART-TIME (Under 30 hours per week)
   _______ NOT EMPLOYED AT THE PRESENT TIME

2. If you are employed either part-time or full-time, please indicate the name and address of the firm and the title of your position.

   Name of Firm you are presently working for:____________________

   Address: ____________________________________

   Supervisor's name:______________________________

   Job Title: __________________________________

3. How satisfied are you with your current position?

   (   ) Very satisfied   (   ) Satisfied   (   ) Not satisfied

4. What is you pay scale (per week)?

   (   ) under $100/week   (   ) $101-$150/week   (   ) over $150/week

Education History

5. Are you currently attending a postsecondary institution (college or university, community college, or private institution)?

   _______ FULL-TIME STUDENT
   _______ PART-TIME STUDENT
   _______ NOT CURRENTLY IN SCHOOL

- Over -

6. If you are attending school either full or part-time, please indicate the name of the institution and your current major or emphasis area.

Name of Institution____

Major or Emphasis Area____

7. Please indicate the type of diploma you expect to receive and your anticipated graduation date:

___ Certification ___ 2-year Associate Degree ___ 4-year College Degree

Expected date of graduation____________________

Other Information

8. If you are not currently employed or attending school, please indicate your current status:________

____

9. What units within the marketing education courses were the most beneficial to you?

____

____

10. What should b emphasized more or added to the marketing education curriculum (what was taught in the class)?

____

____

11. How has the marketing class/classes or training helped you in either business, education, or personal use?

____

____

12. What part of the marketing education program do you feel was not worthwhile or should be changed?

____

____

13. Other comments you wish to make:________________________________

____

____

Thank you for your assistance. Please enclose this questionnaire in the self-addressed stamped envelope and mail today!

Appendix 9D

Employer Questionnaire

EMPLOYER QUESTIONNAIRE

Name of business: ____________________

Address of business: ____________________

____

Name of person completing this survey: ____________________

Name of employee who is a graduate of the marketing education program: ____________________

____

DIRECTIONS: Please indicate your satisfaction with the employee named above as compared with other workers at the same point of entry. If the worker is the only person employed with your firm in that group, compare him/her with others who have worked in the same position. Place an "x" in the space which best reflects your response to each item.

	ITEM	ABOVE AVERAGE	AVERAGE	BELOW AVERAGE	N/A
1.	The quality of the employee's work	____	____	____	____
2.	The quantity of the employee's work	____	____	____	____
3.	The productivity level of the employee	____	____	____	____
4.	The degree to which the employee possesses specific job-related knowledge and skills required on the job	____	____	____	____
5.	The degree to which the employee is able to operate the equipment used on the job	____	____	____	____
6.	The degree to which the employee possesses the basic reading, verbal, and computational skills required on the job	____	____	____	____
7.	Cooperation with co-workers	____	____	____	____
8.	Compliance with company policies, rules, etc.	____	____	____	____
9.	The degree to which the employee has met your expectations	____	____	____	____

10. Major strengths of the employee: ____________________

____

11. Areas of needed improvement of the employee: ____________________

____

12. Recommendation for improving the marketing education program: ____________________

____

Please return this survey at your earliest convenience in the pre-addressed stamped enveloped provided. Your assistance in this survey is greatly appreciated.

Appendix 10A

MODES-TJTC-9

STATE OF MISSOURI
DEPARTMENT OF LABOR AND INDUSTRIAL RELATIONS
DIVISION OF EMPLOYMENT SECURITY
BOX 59 JEFFERSON CITY, MO 65104

JOB SERVICE

Attn: Cooperative Education Coordinator

Targeted Jobs Tax Credit Income Determination has been made on the following Cooperative Education students:

Student	Eligible	Ineligible

For those students shown as eligible, a Form 6199 may be completed in duplicate (original to employer, copy maintained by Coordinator).

If the student has already entered on the job, the written request for TJTC received from the employer prior to the first day of employment must be attached to the Forms 6199.

Very truly yours,

DIVISION OF EMPLOYMENT SECURITY

MODES-TJTC-9
E.S. 12-81

Appendix 10B

MODES-3909

MODES-3909
E.S. 11-81

State of Missouri
DIVISION OF EMPLOYMENT SECURITY

CO-OPERATIVE EDUCATION FAMILY INCOME DETERMINATION FOR TARGETED JOBS TAX CREDIT PROGRAM

Student Name ______________________ Name of School ______________________

Social Security No. ______________________ Address ______________________

Address ______________________ ______________________

____

Please answer the following questions on the income of all family members of the above named student. This information will be used to determine if an employer may receive a tax credit on wages paid to the student while employed.

Your responses are voluntary and will only be used to certify the employer for the tax credit.

FAMILY INCOME: (List only family members earning income now living in the home.)

Family Member	Relationship	Social Security No.	Income Source	Income Last 6 Months (Before Deductions)

Total family members living in home ____________

I certify that the information provided is true and correct to the best of my knowledge. I agree that any information I have supplied may be subject to verification.

Deliberate falsification of information is a federal offense.

Signature ______________________
(Parent or Guardian)

Address ______________________

____

Date ______________________

Return to:

DIVISION OF EMPLOYMENT SECURITY

Street ______________________

City/State ______________________ Zip ____________

Appendix 10C

Form 6199

Form **6199**
(Rev. Jan. 1983)
Department of the Treasury
Internal Revenue Service

Certification of Youth Participating in a Qualified Cooperative Education Program

(For the Jobs Credit Under Section 44B)
(References are to the Internal Revenue Code)

OMB No. 1545-0244
Expires 12-31-84

Certification initiated by ☐ Employer ☐ Student ☐ School

Part I Qualified School Offering Cooperative Education Program

Name of school	Telephone number

Address (Number and street)

City, State, and ZIP code

School system

Part II Employer

Name of business	Employer identification number

Address (Number and street)

City, State, and ZIP code

Employer representative	Title	Telephone number

Part III Student

Name	Date of birth (month, day, year)—Student must be at least age 16, but not yet age 20	Social security number

Address (Number and street)

City, State, and ZIP code

Student's first day on the job. (Must have been hired by you for the first time after September 26, 1978.)	Starting wage per hour
Dates of cooperative program of the student From (date) to	Number of hours per week

Part IV Certification by the School *(See Instruction B for Definitions)*

I certify that the student named in Part III is a "youth participating in a qualified cooperative education program"; the school named in Part I is a "qualified school"; and the cooperative education program of the school in which the student is enrolled is a "qualified cooperative education program." I also certify that the student has been determined to be a member of an economically disadvantaged family by an office of the State Employment Security Agency.

Name of certifying officer (type or print)	Title
Signature ▶	Date

Part V Signature of Employer *(See Instruction C)*

I certify that this information is correct and true to the best of my knowledge. This form is for obtaining the benefits of the Jobs Credit under section 44B. I understand that my credit for employing the student named in Part III will end if this certification becomes invalid.

Signature ▶	Date

For Paperwork Reduction Act Notice, see back of form.

Instructions

Paperwork Reduction Act Notice.—We ask for this information to carry out the Internal Revenue laws of the United States. We need it to ensure that taxpayers are complying with these laws and to allow us to figure and collect the right amount of tax. You are required to give us this information.

A. Purpose of Form 6199

For an individual to qualify as a youth participating in a qualified cooperative education program (as defined in B below), a qualified school must certify in writing that the student meets the conditions in B(1) below. The school may meet the certification requirement by completing Form 6199. The certification allows the employer named in Part II of Form 6199 to claim the jobs credit for qualified wages paid or incurred to the student named in Part III of the form.

The school must prepare Parts I through IV of Form 6199 in duplicate. The original of the form is given to the employer and a copy is kept by the school for its records.

B. Definitions

(1) Youth Participating in a Qualified Cooperative Education Program.—The term "youth participating in a qualified cooperative education program" means any individual who meets the following conditions:

(i) is age 16 but not yet age 20, and

(ii) has not graduated from a high school or vocational school, and

(iii) is actively pursuing a qualified cooperative education program, and

(iv) is a member of an economically disadvantaged family.

(2) Qualified School.—The term "qualified school" means:

(i) a specialized high school principally for vocational education,

(ii) the department of a high school principally for vocational education, or

(iii) a technical or vocational school principally for vocational education of persons who have completed or left high school.

A school which is not a public school is a qualified school only if it is exempt from tax under section 501(a).

(3) Qualified Cooperative Education Program.—See section 51(d)(8)(B) and the related regulations for the definition of a qualified cooperative education program.

(4) Members of Economically Disadvantaged Families.—An individual is a member of an economically disadvantaged family if the designated local agency (State employment security agency) determines that the individual was a member of a family which had an income during the 6 months immediately preceding the earlier of the month in which the determination is made or the month in which the employee is hired, which, on an annual basis, would be 70 percent or less of the Bureau of Labor Statistics lower living standard.

C. Instructions for Employer

(1) The qualified first-year wages or qualified second-year wages paid to the employees certified as youths participating in a qualified cooperative education program are reported on IRS Form 5884, Jobs Credit.

(2) On receiving this form from the school, the employer must sign Part V certifying that the information on the form is correct before he or she can claim the jobs credit for wages paid to the student named on the form. The employer must keep Form 6199 for tax purposes.

(3) For more information on the jobs credit, see **Publication 906**, Jobs and Research Credits.

☆U.S. Government Printing Office: 1983—421-108/238

Appendix 10D

I-9 Form

U.S. Department of Justice
Immigration and Naturalization Service

OMB No. 1115-0136
Employment Eligibility Verification

Please read instructions carefully before completing this form. The instructions must be available during completion of this form. ANTI-DISCRIMINATION NOTICE. It is illegal to discriminate against work eligible individuals. Employers CANNOT specify which document(s) they will accept from an employee. The refusal to hire an individual because of a future expiration date may also constitute illegal discrimination.

Section 1. Employee Information and Verification. To be completed and signed by employee at the time employment begins

Print Name: Last First Middle Initial | Maiden Name

Address (*Street Name and Number*) Apt. # | Date of Birth (*month/day/year*)

City State Zip Code | Social Security #

I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

I attest, under penalty of perjury, that I am (check one of the following):
☐ A citizen or national of the United States
☐ A Lawful Permanent Resident (Alien # A ____________
☐ An alien authorized to work until ____/____/____
(Alien # or Admission # ____________

Employee's Signature | Date (*month/day/year*)

Preparer and/or Translator Certification. *(To be completed and signed if Section 1 is prepared by a person other than the employee.) I attest, under penalty of perjury, that I have assisted in the completion of this form and that to the best of my knowledge the information is true and correct.*

Preparer's/Translator's Signature | Print Name

Address (*Street Name and Number, City, State, Zip Code*) | Date (*month/day/year*)

Section 2. Employer Review and Verification. To be completed and signed by employer. Examine one document from List A OR examine one document from List B and one from List C as listed on the reverse of this form and record the title, number and expiration date, if any, of the document(s)

	List A	OR	List B	AND	List C
Document title:	____________		____________		____________
Issuing authority:	____________		____________		____________
Document #:	____________		____________		____________
Expiration Date (*if any*):	___/___/___		___/___/___		___/___/___
Document #:	____________				
Expiration Date (*if any*):	___/___/___				

CERTIFICATION - I attest, under penalty of perjury, that I have examined the document(s) presented by the above-named employee, that the above-listed document(s) appear to be genuine and to relate to the employee named, that the employee began employment on *(month/day/year)* ____/____/____ **and that to the best of my knowledge the employee is eligible to work in the United States. (State employment agencies may omit the date the employee began employment).**

Signature of Employer or Authorized Representative | Print Name | Title

Business or Organization Name | Address (*Street Name and Number, City, State, Zip Code*) | Date (*month/day/year*)

Section 3. Updating and Reverification. To be completed and signed by employer

A. New Name (*if applicable*) | B. Date of rehire (*month/day/year*) (*if applicable*)

C. If employee's previous grant of work authorization has expired, provide the information below for the document that establishes current employment eligibility.

Document Title: ____________ Document #: ____________ Expiration Date (if any): ___/___/___

I attest, under penalty of perjury, that to the best of my knowledge, this employee is eligible to work in the United States, and if the employee presented document(s), the document(s) I have examined appear to be genuine and to relate to the individual.

Signature of Employer or Authorized Representative | Date (*month/day/year*)

Form I-9 (Rev. 11-21-91) N

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LISTS OF ACCEPTABLE DOCUMENTS

LIST A

Documents that Establish Both Identity and Employment Eligibility

1. U.S. Passport (unexpired or expired)
2. Certificate of U.S. Citizenship *(INS Form N-560 or N-561)*
3. Certificate of Naturalization *(INS Form N-550 or N-570)*
4. Unexpired foreign passport, with *I-551 stamp* or attached *INS Form I-94* indicating unexpired employment authorization
5. Alien Registration Receipt Card with photograph *(INS Form I-151 or I-551)*
6. Unexpired Temporary Resident Card *(INS Form I-688)*
7. Unexpired Employment Authorization Card *(INS Form I-688A)*
8. Unexpired Reentry Permit *(INS Form I-327)*
9. Unexpired Refugee Travel Document *(INS Form I-571)*
10. Unexpired Employment Authorization Document issued by the INS which contains a photograph *(INS Form I-688B)*

OR

LIST B

Documents that Establish Identity

1. Driver's license or ID card issued by a state or outlying possession of the United States provided it contains a photograph or information such as name, date of birth, sex, height, eye color, and address
2. ID card issued by federal, state, or local government agencies or entities provided it contains a photograph or information such as name, date of birth, sex, height, eye color, and address
3. School ID card with a photograph
4. Voter's registration card
5. U.S. Military card or draft record
6. Military dependent's ID card
7. U.S. Coast Guard Merchant Mariner Card
8. Native American tribal document
9. Driver's license issued by a Canadian government authority

For persons under age 18 who are unable to present a document listed above:

10. School record or report card
11. Clinic, doctor, or hospital record
12. Day-care or nursery school record

AND

LIST C

Documents that Establish Employment Eligibility

1. U.S. social security card issued by the Social Security Administration *(other than a card stating it is not valid for employment)*
2. Certification of Birth Abroad issued by the Department of State *(Form FS-545 or Form DS-1350)*
3. Original or certified copy of a birth certificate issued by a state, county, municipal authority or outlying possession of the United States bearing an official seal
4. Native American tribal document
5. U.S. Citizen ID Card *(INS Form I-197)*
6. ID Card for use of Resident Citizen in the United States *(INS Form I-179)*
7. Unexpired employment authorization document issued by the INS *(other than those listed under List A)*

Illustrations of many of these documents appear in Part 8 of the Handbook for Employers (M-274)

U.S. Department of Justice
Immigration and Naturalization Service

OMB No. 1115-0136
Employment Eligibility Verification

INSTRUCTIONS

PLEASE READ ALL INSTRUCTIONS CAREFULLY BEFORE COMPLETING THIS FORM.

Anti-Discrimination Notice. It is illegal to discriminate against any individual (other than an alien not authorized to work in the U.S.) in hiring, discharging, or recruiting or referring for a fee because of that individual's national origin or citizenship status. It is **illegal** to discriminate against work eligible individuals. Employers **CANNOT** specify which document(s) they will accept from an employee. The refusal to hire an individual because of a future expiration date may also constitute illegal discrimination.

Section 1 - Employee. All employees, citizens and noncitizens, hired after November 6, 1986, must complete Section 1 of this form at the time of hire, which is the actual beginning of employment. **The employer is responsible for ensuring that Section 1 is timely and properly completed.**

Preparer/Translator Certification. The Preparer/Translator Certification must be completed if Section 1 is prepared by a person other than the employee. A preparer/translator may be used only when the employee is unable to complete Section 1 on his/her own. However, the employee must still sign Section 1 personally.

Section 2 - Employer. For the purpose of completing this form, the term "employer" includes those recruiters and referrers for a fee who are agricultural associations, agricultural employers, or farm labor contractors.

Employers must complete Section 2 by examining evidence of identity and employment eligibility within three (3) business days of the date employment begins. If employees are authorized to work, but are unable to present the required document(s) within three business days, they must present a receipt for the application of the document(s) within three business days and the actual document(s) within ninety (90) days. However, if employers hire individuals for a duration of less than three business days, Section 2 must be completed at the time employment begins. **Employers must record:** 1) document title; 2) issuing authority; 3) document number, 4) expiration date, if any; and 5) the date employment begins. Employers must sign and date the certification. Employees must present original documents. Employers may, but are not required to, photocopy the document(s) presented. These photocopies may only be used for the verification process and must be retained with the I-9. **However, employers are still responsible for completing the I-9.**

Section 3 - Updating and Reverification. Employers must complete Section 3 when updating and/or reverifying the I-9. Employers must reverify employment eligibility of their employees on or before the expiration date recorded in Section 1. Employers **CANNOT** specify which document(s) they will accept from an employee.

- If an employee's name has changed at the time this form is being updated/ reverified, complete Block A.
- If an employee is rehired within three (3) years of the date this form was originally completed and the employee is still eligible to be employed on the same basis as previously indicated on this form (updating), complete Block B and the signature block.
- If an employee is rehired within three (3) years of the date this form was originally completed and the employee's work authorization has expired or if a current employee's work authorization is about to expire (reverification), complete Block B and:
  - examine any document that reflects that the employee is authorized to work in the U.S. (see List A or C),
  - record the document title, document number and expiration date (if any) in Block C, and
  - complete the signature block.

Photocopying and Retaining Form I-9. A blank I-9 may be reproduced provided both sides are copied. The Instructions must be available to all employees completing this form. Employers must retain completed I-9s for three (3) years after the date of hire or one (1) year after the date employment ends, whichever is later.

For more detailed information, you may refer to the INS Handbook for Employers, (Form M-274). You may obtain the handbook at your local INS office.

Privacy Act Notice. The authority for collecting this information is the Immigration Reform and Control Act of 1986, Pub. L. 99-603 (8 U.S.C. 1324a).

This information is for employers to verify the eligibility of individuals for employment to preclude the unlawful hiring, or recruiting or referring for a fee, of aliens who are not authorized to work in the United States.

This information will be used by employers as a record of their basis for determining eligibility of an employee to work in the United States. The form will be kept by the employer and made available for inspection by officials of the U.S. Immigration and Naturalization Service, the Department of Labor, and the Office of Special Counsel for Immigration Related Unfair Employment Practices.

Submission of the information required in this form is voluntary. However, an individual may not begin employment unless this form is completed since employers are subject to civil or criminal penalties if they do not comply with the Immigration Reform and Control Act of 1986.

Reporting Burden. We try to create forms and instructions that are accurate, can be easily understood, and which impose the least possible burden on you to provide us with information. Often this is difficult because some immigration laws are very complex. Accordingly, the reporting burden for this collection of information is computed as follows: 1) learning about this form, 5 minutes; 2) completing the form, 5 minutes; and 3) assembling and filing (recordkeeping) the form, 5 minutes, for an average of 15 minutes per response. If you have comments regarding the accuracy of this burden estimate, or suggestions for making this form simpler, you can write to both the Immigration and Naturalization Service, 425 I Street, N.W., Room 5304, Washington, D. C. 20536; and the Office of Management and Budget, Paperwork Reduction Project, OMB No. 1115-0136, Washington, D.C. 20503.

Form I-9 (Rev. 11-21-91) N

EMPLOYERS MUST RETAIN COMPLETED I-9
PLEASE DO NOT MAIL COMPLETED I-9 TO INS

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